Guide to Silver Back Office
for
NCR Silver Pro Restaurant

CONTENTS

INTRODUCTION

NCR Silver™ Pro is a cloud-based point-of-sale (POS) solution for restaurants that consists of two applications, Silver Back Office and the POS app. You access Silver Back Office through a Web browser to configure the majority of your store settings, track transactions, market to your customers, and update your menu. You access the POS app using one of the system devices from which you operate your POS. You also configure some of your NCR Silver Pro settings, such as your floor plan, printer assignments, and more.

This document provides instructions on how to configure settings, add and edit your menu, manage your employees, review reports, and others.
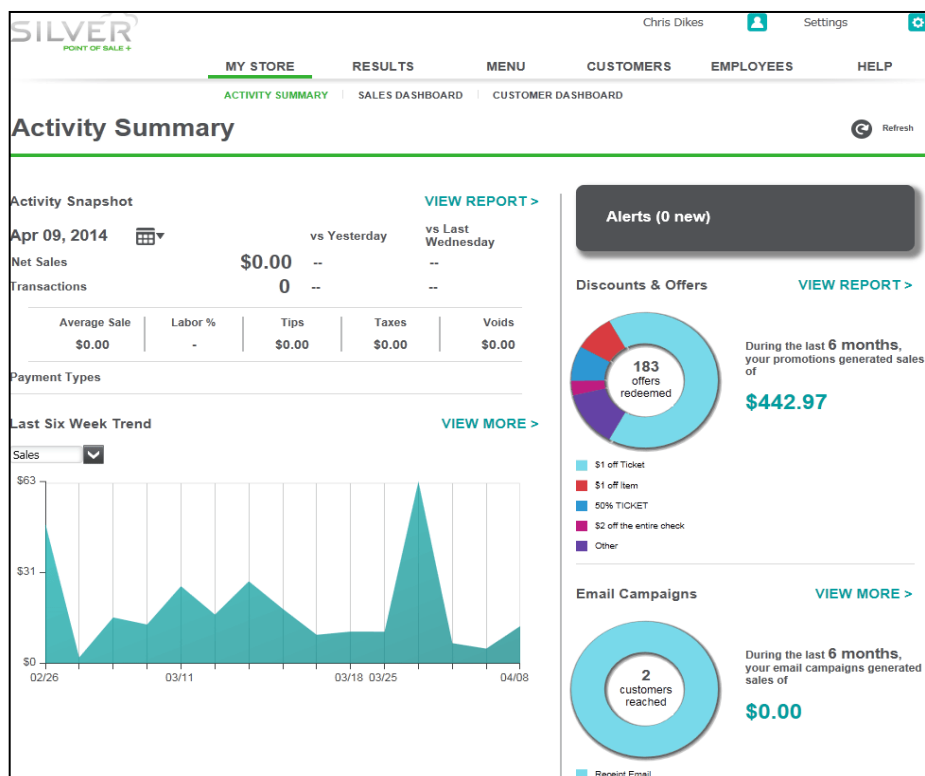
When you log in to Silver Back Office, Activity Summary is the default view. You will see, depending on your access level, the following menu headings:

My Store — Provides a quick view of your store activity, including sales, trends, any alerts, discount offers redeemed, and the status of email campaigns. The Sales Dashboard provides a real-time snapshot of your business and the Customer Dashboard allows you to track your customer activity and review your marketing campaigns.

Results — Allows you to analyze your business. Choose from a variety of reports, and review POS transactions, financial shifts, labor shifts, and credit settlement.

Menu — Enables you to create and manage the items you offer in your restaurant. Group items by categories for ease of navigation. Add modifiers to increase customer satisfaction, and provide potential upsell opportunities. You can also create discounts and events for your operation.

Customers — Enables you to capture customer information and increase your marketing capabilities. Create an email marketing campaign, import, add, review and edit a list of your customers, create and monitor a customer loyalty program, and market your business via Facebook and Twitter.

Employees — Allows you to add and manage your employees and the user roles for your restaurant.

[Username] — identifies the user logged in to Silver Back Office and enables an employee to change their Silver Back Office password.

Settings — Allows you to edit your store and company information, create and edit your tax settings, payment types, and printer groups.

Help — Links you to an online site to assist you with your questions and to help you learn the full suite of features available with NCR Silver Pro Restaurant.

LOGGING INTO SILVER BACK OFFICE

You receive an introductory email message from NCR Silver Pro following the creation of your account. The message contains a link to Silver Back Office, your username, and a temporary password.

The first time you enter the site, Silver Back Office requires you to change your password. Enter the password exactly as it appears in the email message. Passwords are case-sensitive.

We recommend you disable popup blockers when accessing the Silver Back Office, to ensure you see all available screens.

MY STORE

The MY STORE menu heading contains ACTIVITY SUMMARY, SALES DASHBOARD, AND CUSTOMER DASHABOARD

ACTIVITY SUMMARY

ACTIVITY SUMMARY provides a quick snapshot of your store sales.
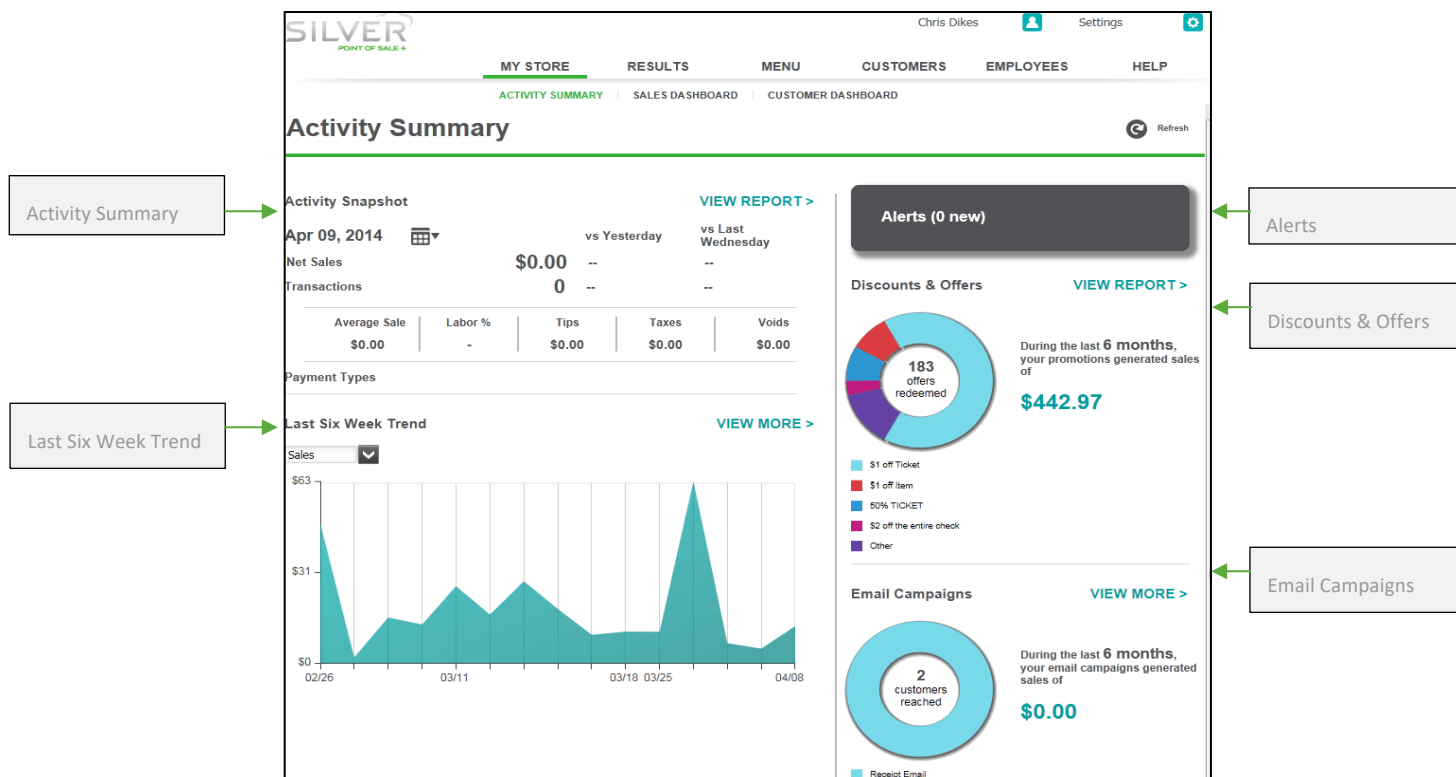
Activity Snapshot — Defaults to the current date and displays a visual snapshot of net sales and transactions. Compares the sales and transactions to the previous day and the same day of the previous week. You can also review the average sale, tips collected, taxes due, and the dollar amount of voids for the date selected. Activity Snapshot also provides a visual indication of cash payments compared to credit payments.

Last Six Week Trend — Displays a graphical trend of your sales or transactions for the previous six weeks.

Alerts — Notifies you of unusual sales activity within the previous seven days, such as higher than normal sales or higher than normal price overrides. Click More to see additional information on the alert.

Discounts & Offers — Provides a snapshot demonstrating the impact of your discounts and offers. See the number of offers redeemed, the sales generated, and the types of discounts and offers redeemed.

Email Campaigns — Provides a snapshot demonstrating the impact of your email marketing campaigns. See the number of customers reached, the sales generated, and the types of emails sent through your email marketing campaign.

SALES DASHBOARD

Sales Dashboard provides a real-time snapshot of your sales, including net sales, by category and by item, for your restaurant.
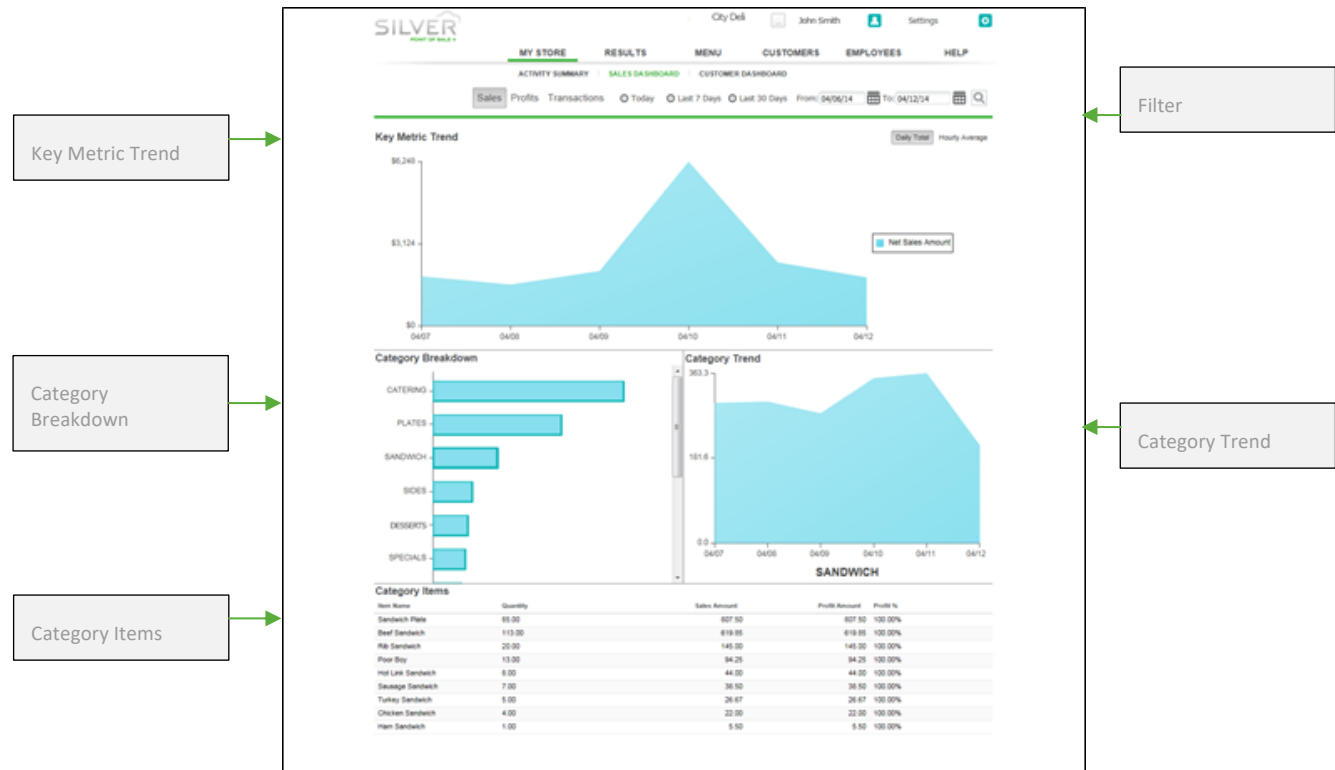
Filter — Allows you to view a snapshot of your business by sales, profits, or transactions, and select a time period to review.

Key Metric Trend — Displays the results of the selections you made in the filter. Additionally, you can opt to review your data by daily total or hourly average.

Category Breakdown and Category Trend — Displays the results for each category and ranks the categories from highest to lowest according to your filter. Select a category to display a plot line to the right in Category Trend for the selected time period and metric.

Category Items — Provides a further analysis of your sales, enabling you to review the best and worst selling items within each category. You can sort each column to assist you with your analysis.

CUSTOMER DASHBOARD

Customer Dashboard enables you to identify your top customers and evaluate your marketing efforts to your customers.
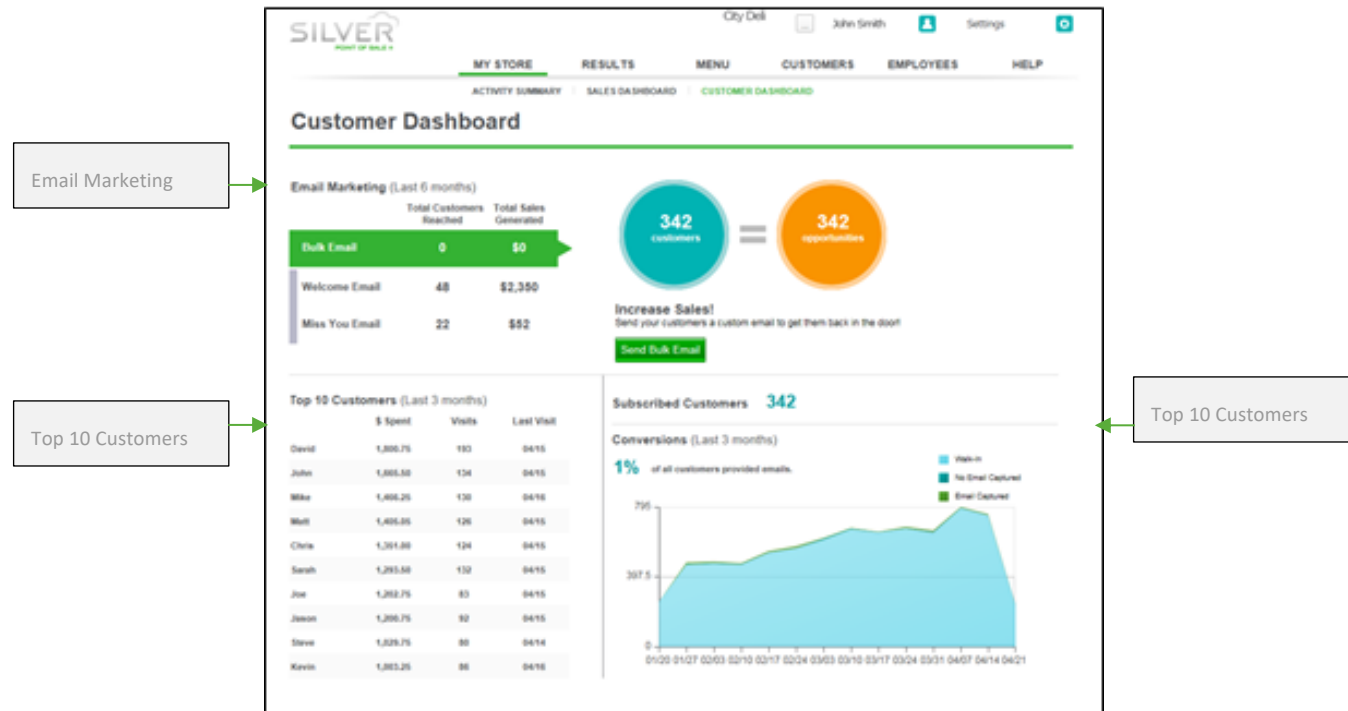
Email Marketing — Displays a quick snapshot of your email marketing campaigns for the previous six months. See which email campaigns you used, how many customers you reached, and the sales generated from the different types of email campaigns. Select an email campaign to see a graph demonstrating how many emails were sent, opened, and redeemed for the time period.

Top 10 Customers — Displays your top 10 customers in terms of dollars spent. You can sort the list by dollars spent, number of visits, or last visit.

Subscribed Customers and Conversions — Displays your effectiveness in capturing customer email information during the previous three months. Subscribed Customers identifies the number of email addresses you captured. Conversions provides a snapshot of your efforts in capturing email addresses from your customers.
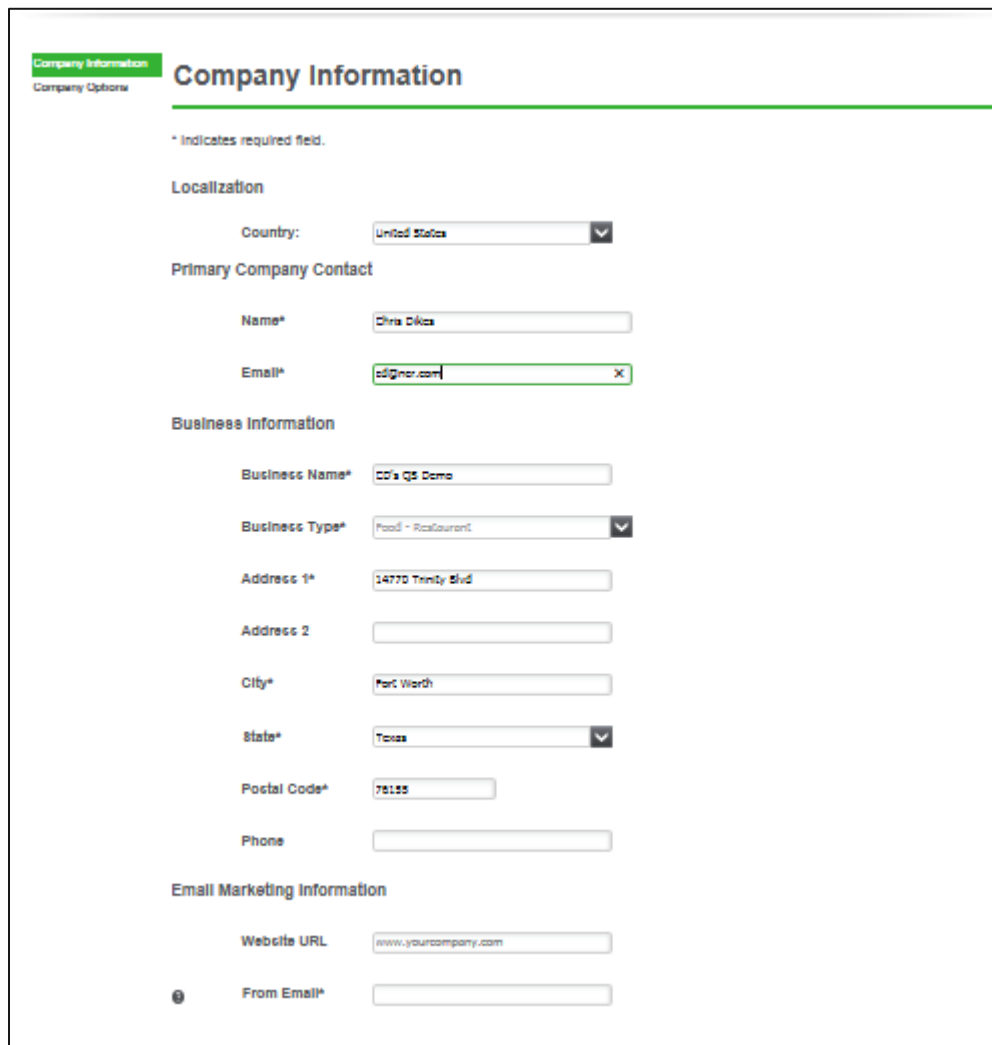
COMPANY INFORMATION

Access Silver Back Office using a Web browser and use the Settings menu to configure your company information, store information, taxes, payments, customer pay in/out codes, charges, and kitchen printer routing.

ENTERING YOUR COMPANY INFORMATION

Silver Back Office pre-populates the company information with the information entered when your account was created.

1. Select **Settings** > **Company Information**.
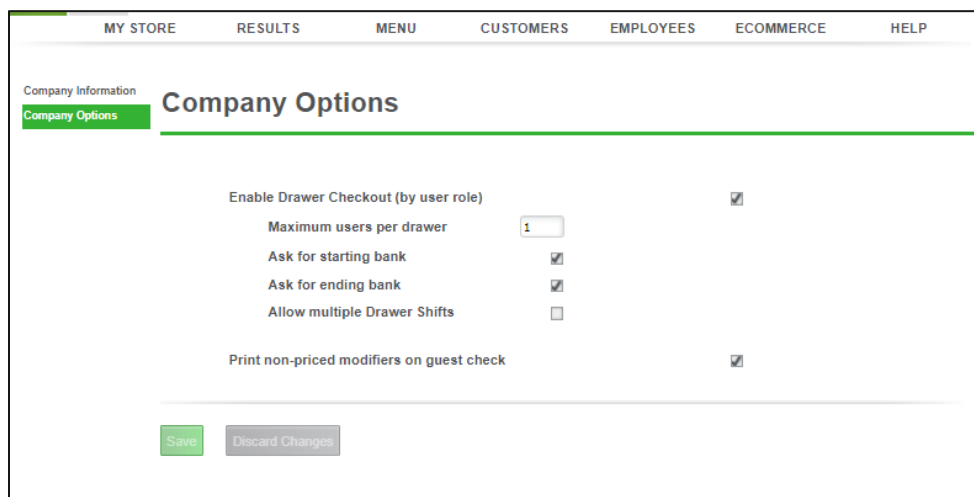
2. Review and edit the **Country** of operation to change **Localization** settings such as currency indicators, address and date/time formats.

3. Review and edit the **name** and **email address** for the primary contact person for your company, if necessary.

4. Review and edit the **business name**, **address**, and **phone number**, if necessary.

5. Type the **Web site URL** for your company. The system displays the Web site URL on receipts you print and email.

6. Type the **email address** to use for email marketing. The system displays this email address as the 'From' email address in any email marketing messages.

7. Click **Save**.

8. (Optional) Click **Company Options** on the left side of the screen.

9. (Optional) Select **Enable Drawer Checkout (by user role)**. Drawer checkout enables you to assign multiple users to the same cash drawer and to have your employees enter a starting and ending bank amount. If you do not plan to use Drawer Checkout, leave this option blank.

   - If you enable Drawer Checkout, you must also access EMPLOYEES > USER ROLES and update your user role settings to enable a user role for drawer checkout.

10. (Optional) Type the **maximum number** of users per cash drawer.

11. (Optional) Click **Ask for starting bank** to require the POS to prompt employees to enter a starting bank amount.

12. (Optional) Click **Ask for ending bank** to require the POS to prompt employees to enter an ending bank amount.

13. (Optional) Click **Allow Multiple Drawer Shifts** to allow multiple shifts on the same POS/Drawer

14. (Optional) Select **Print non-priced modifiers on guest check** to have non-priced modifiers not appear on customer receipts. They will only appear on kitchen chits.

15. Click **Save**.

STORE INFORMATION

Store information enables you to designate information to appear on the customer receipt and to configure store specific settings. The settings are split into **Store Configuration** and **Store Options**.

1. Select **Settings** > **Store**. The **Store Configuration** will appear.

2. Review and edit the **name, phone number**, and **email address** of the primary store contact for NCR support, if necessary. The system retrieves the information entered when creating your account.

3. Under 'Receipt information, type the **store name**.

   Any information you enter under 'Receipt information' appears on the receipts you provide to your customers.

4. Type the **address**. You can optionally type additional address information in Address 2.

5. Type the **city, state**, and **zip code**.

6. Type the **store phone number**.

7. In Receipt Message, type any **additional information** you want to appear on your receipts.

8. (Optional) Enter a URL to print on receipts as a QR code.

9. Click **Preview Email Receipt** to view a receipt on the screen.

10. Select **Tip Message** to type a message and set tip amount suggestions to appear on the guest check.

11. Click **Save**.

12. Click **Store Options** on the left side of the screen.

14

13. Select **Gratuity** to allow customers to provide non-cash tips. When you select 'Gratuity,' it is necessary to define a gratuity tax under Settings > Taxes, if you are subject to gratuity tax.

14. Select **Subtract Tip and Gratuity totals from cash calculations in financial shifts** to have the system remove employee tips and gratuities earned from the 'Total Cash Owed' amount at the end of a shift. By default, the system enables this feature. By enabling the feature, the employee potentially keeps any tips earned. To not have the system subtract tips and gratuity totals from the 'Total Cash Owed' amount, clear this feature.

15. Select which **Order Modes** to enable. When you select this feature, Silver Back Office adds the Phone/Drive Thru icon to the POS home screen and additional options appear. Enabling different order mode allows you to manage a queue specific to that order type.

    - (Optional) Takeout, Delivery and Catering orders have an additional option called **Simple Order Name**. When active, simple order name allows you to enter a one-time-use name for the order instead of creating an additional customer record in your system for every order.

    - (Quick Service Only) Select **Prompt for Order Mode** to prompt employees to select Dine In or Takeout for customer orders.

    - (Quick Service Only) Select **Print 'Dine In' on Kitchen Chits** to print '***DINE IN***' on kitchen chits for dine in orders. Otherwise, a header identifying an order as a Dine In order does not print on the kitchen chit. Takeout and Delivery always prints on kitchen chits for those order modes.

    - (Optional) Select a **charge** to apply to active order types. You can also have a charge automatically apply to a ticket when you select takeout or delivery order mode. You must first setup a charge.

16. (Optional) Select a **Dine in Charge** to add charges to dine in orders, for example a license tax (See **Charges** section for more detail).

17. Click **Enable Breaks** to add the option for employees to take non-paid breaks during their shift. When an employee logs in to the POS and clocks in, a Start Break icon is added to the POS home screen.

    - Type the **minimum amount** of minutes to enforce for breaks, which is the required amount of time an employee must remain on break. If an employee wishes to return to break early, a supervisor's approval is required.
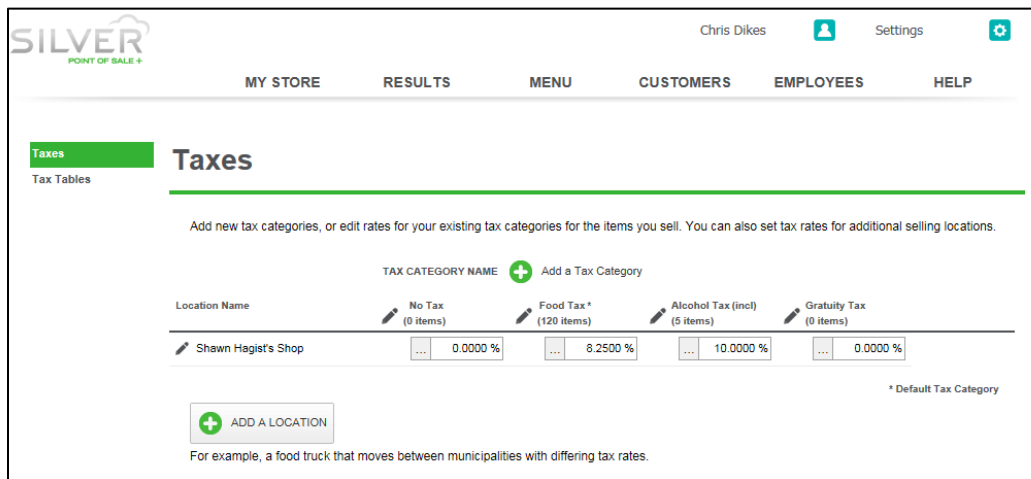
18. (Optional) Select **Automatically close pre-paid orders** for online orders. When you select this feature, fully paid online orders will not appear in the Takeout/Delivery queue and will not require you to close the order. Rather, as soon as the POS receives the order, a customer receipt prints and the order is closed. Note: This feature does not appear until you receive at least one online order.

19. (Optional) Enter a **takeout download threshold time** for online orders designated as takeout to print a kitchen chit. By default, the POS prints a kitchen chit to the defined kitchen printers 30 minutes prior to the order target time.

20. (Optional) Enter a **delivery download threshold time** for online orders designated as delivery to print a kitchen chit. By default, the POS prints a kitchen chit to the defined kitchen printers 60 minutes prior to the order target time.

21. (Optional) You can change your preferred method of guest counting.

    - Table Service users can count by occupied seat (the default), by guest count prompt or by items.

    - Quick Service users can count as 1 guest per transaction (the default mode), by prompt or by item.

22. Click **Save**.

TAXES

NCR Silver™ Pro Restaurant enables you to easily comply with the sales tax regulations to which you are subject. You can quickly configure the tax settings to assess the correct sales tax. You can create multiple tax categories, designate a tax category as inclusive or exclusive, elect to calculate sales tax by a percentage or according to a tax table, and create multiple locations, if you operate in locations subject to different tax regulations. Additionally, you can configure the system to apply a different tax rate for specific order modes, such as takeout and delivery. NCR Silver Pro Restaurant provides a number of reports enabling you to track the collection of sales taxes.

The system defaults the tax category to a 'No Tax' category.

SETTING UP A TAX CATEGORY

A tax category allows you to assign a single tax rate to one or more items. You can configure as many tax categories as necessary for the items you sell, and designate a specific tax category to use as the default when you create a new item; otherwise, the system defaults the tax category to a 'No Tax' category. For example, create a tax category called Food Tax and assign it to food items, such as hamburgers and french fries. Create another tax category called Alcohol and assign it to your alcoholic beverages, such as beer and wine. When you create a guest check for a hamburger, french fries, and a beer, the system calculates the applicable tax based on the tax rate associated with the tax category assigned to each item.

1. Select **Settings > Taxes**.

2. Click **Add a Tax Category**. The Add New Tax Category screen appears.

3. Type a **name** for the tax category.

4. Select **Make this my default Tax Category**, if you plan to use this tax category for applying your main tax rate. You

can only select one tax category as the default. On the Taxes page, the system identifies the default tax category with an asterisk next to the name.
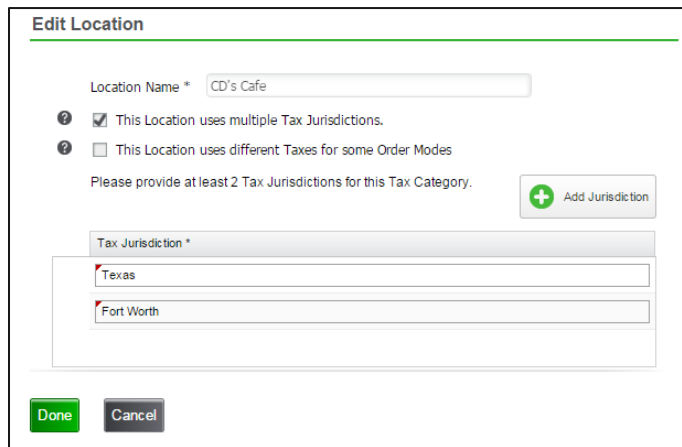
5. Select **Make this an inclusive tax** to include the sales tax in the quoted price to make the transaction easier for some items, such as alcoholic beverages. For tax categories identified as inclusive, Silver Back Office adds '(incl)' next to the tax category name on the Taxes page.

6. Click **Done** to return to the Taxes screen.

7. Locate the **category** just created and type the **applicable tax rate**.

8. Click **Save**.

WORKING WITH TAX JURISDICTIONS

In some locations, it is necessary to track the collection of sales tax according to tax jurisdiction and to display the sales tax assessed by tax jurisdiction on the customer receipt. A tax jurisdiction is an area subject to its own distinct tax regulations, such as a municipality, city, county, or country. For example, a restaurant in Fort Worth, Texas could be subject to multiple tax jurisdictions, such as the state of Texas, the city of Fort Worth, and Tarrant county.

NCR Silver Pro enables you to easily configure your tax settings to comply with your tax jurisdiction regulations.

1. Select **Settings > Taxes**.

2. Click the **location name**. The Edit Location screen appears.

3. Select **This location uses multiple Tax Jurisdictions**. The Edit Location screen expands to include Tax Jurisdictions.

    If you require more than two tax jurisdictions, click Add Jurisdiction.

4. Under 'Tax Jurisdiction,' type the **name** for each tax jurisdiction.

5. (Optional)

6. Click **Done**. The system returns to the Taxes screen.

7. For each tax jurisdiction, enter the **tax percentage** or select the **tax table** for each category.

8. Click **Save** and exit the **Taxes** screen.

After you configure tax jurisdictions, NCR Silver Pro displays the assessment of sales tax according to tax jurisdiction on the customer receipt.

18

CONFIGURING TAX BY ORDER MODE

Some tax entities require you to assess taxes based on the order mode of the order, such as for takeout or delivery orders. NCR Silver Pro Restaurant enables you to automatically assess a tax rate based on the order mode of the order. Prior to configuring an order mode tax for Takeout/Delivery, you must enable Takeout/Delivery.

1. In Silver Back Office, select **Settings > Taxes**.

2. Click the **tax location** for which you want to create an order mode tax. The Edit Location dialog appears.

3. Select **This location uses different taxes for some order modes**.

4. Click **Done**. The system returns to the Taxes page.

5. Type the **tax rate** for the order mode.

6. Click **Save**.

ADDING A TAX LOCATION
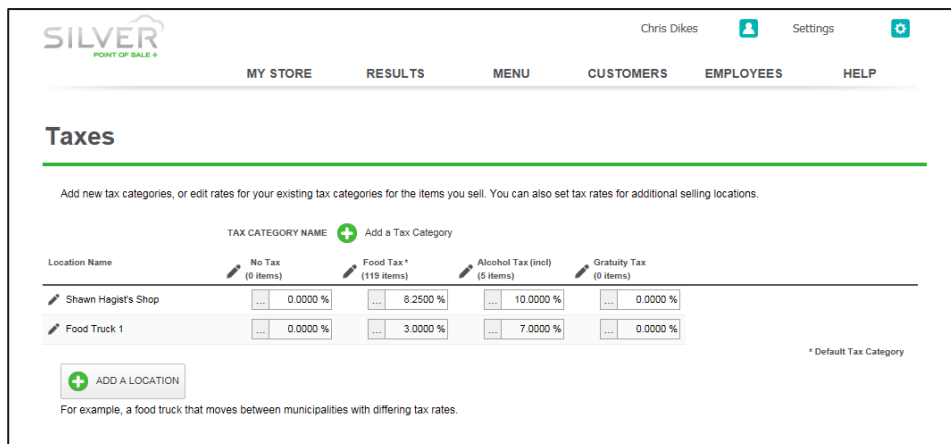
Some operations, such as food trucks, operate in different tax jurisdictions, and it is necessary to assess sales tax based on their location. NCR Silver Pro enables you to add multiple tax locations to comply with these regulations

1. Select **Settings > Taxes**.

2. Click **ADD A LOCATION**. The Add New Location screen appears.

3. Type the **name** for the location.

   If tax regulations require this location to assess and display sales taxes according to jurisdiction, see the preceding procedure 'Working with Tax Jurisdictions.'

   You can also flag that the location uses multiple tax rates for different order modes, that way you can tax appropriately if the takeout or catering tax rate differs.

4. Click **Done**. The system returns to the Taxes screen.

5. Enter the **tax rate**, or select the **tax table**, for each tax category.

6. Click **Save**.

Once you add additional locations, NCR Silver Pro allows you to select the location you want to use at the login screen. Tap **NCR Silver Pro** on the device. The login screen appears. With multiple selling locations, the login screen identifies the

currently selected location. Tap **Tap to change** to select a different location. The 'Selling locations' screen appears. Tap the **location** you want to use. The system returns to the login screen. NCR Silver Pro remembers the location you select and defaults to it, until you choose a different location. Type your **four-digit PIN** and tap **Login**.

EXCLUDING INCLUSIVE TAXES

There is an option to exclude inclusive taxes from specific order mode tax rates. This is primarily used outside of the USA, but it is a method for calculating the correct item cost in circumstances when no tax should be applied to an item which is inclusively taxed under normal conditions. To enable the tax exclusion:

1. This exclusion is only for order modes like takeout, delivery and catering that are normally inclusively taxed. You must have order mode overrides flagged on and a tax rate marked as inclusive.

2. Once the overrides and inclusive tax are set up, click the **"…"** to the left of the tax rate number and a pop up window will appear.
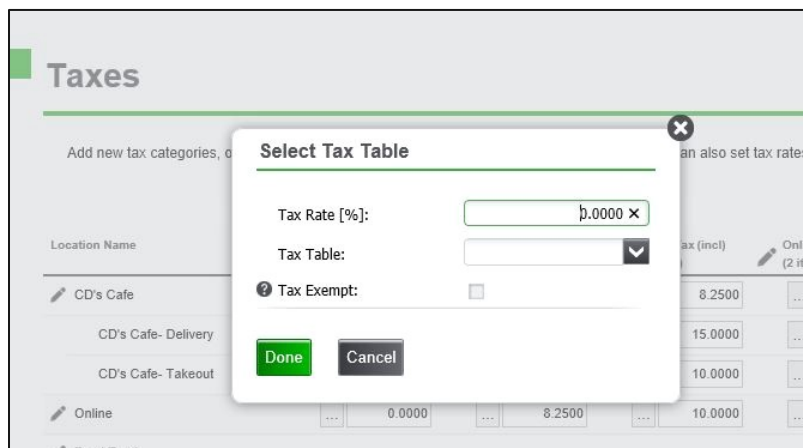
3. Active the **Tax-Exempt** option by clicking the empty check-box. If you need to remove the tax exempt option, simply click the check-box so that it is empty.

4. Click **Done** and then click **Save** on the Taxes page.

CREATING A TAX TABLE

Some states require the use of a tax table to calculate sales tax. NCR Silver Pro Restaurant enables you to create a tax table for each jurisdiction with which you need to comply.

Prior to configuring a tax table in NCR Silver Pro Restaurant, obtain a copy of the tax table to which you are subject. It is necessary to determine the **period of tax repetition** for the tax table and the **tax amount for each period of tax repetition**.

The **period of tax repetition** is the point at which the tax table begins repeating itself. You determine the point at which your tax table begins to repeat itself by looking at the fractional portion of your specific tax rate. The following table shows the period of tax repetition for the following fractional portions of a tax rate: '.0,' '0.25,' '0.5,' and '0.75.'

Table: Determining Your Period of Tax Repetition

Tax Rate %	When the fractional portion of the tax rate is…	Your period of tax repetition is…
6.0%	.0%	$1.00
6.50%	.5%	$2.00
6.25% or 6.75%	.25% or .75%	$4.00

You calculate the **tax** for each period of tax repetition by multiplying the period of repetition by the tax table percentage. For example, if the tax table percentage is 7.75%, then the period of tax repetition is '$4.00.' When you multiply '$4.00' x '7.75%,' the answer is $0.31. This is the tax for each period of tax repetition. Once you determine the period of tax repetition and the tax for each period, you can begin to create a tax table in NCR Silver Pro Restaurant.
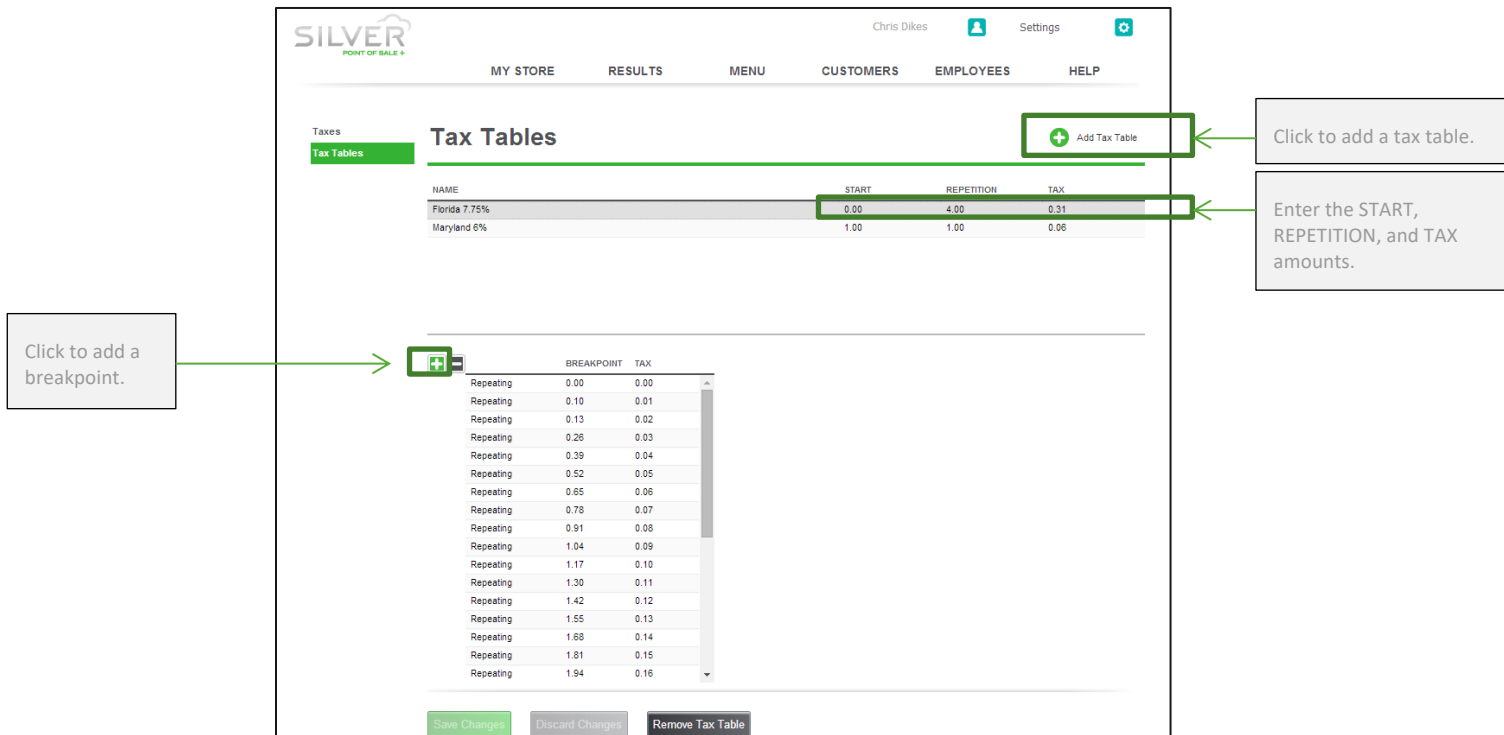
Breakpoints are the value at which you must apply a higher tax. When you create a tax table in NCR Silver Pro Restaurant, it is necessary to input the required breakpoints. For example, if the period of repetition is '4.00,' then you would input the breakpoints up to and inclusive of '$4.00.' Consult the tax table for which you are subject to locate the breakpoints.

NCR Silver Pro Restaurant only supports tax tables with exclusive taxes.

Refer to the following two scenarios, and to the appendices at the end of this document for specific examples regarding Florida tax tables.

***FLORIDA TAX TABLE SCENARIO:* You are subject to the Florida 7.75% tax table.**

1. Select **Settings > Taxes**.
2. Click **Add Tax Table**.

3. Type a **name** for the tax table. In the scenario above, type 'Florida 7.75%.'

4. Leave the **amount** as '0.00' for 'START.' In most cases, the amount will be '0.0'; however, in some states, such as Maryland, where the first dollar is taxed differently than subsequent dollars, it is necessary to enter an amount other than '0.00' in START. For more information, refer to the Maryland Tax Table scenario.

5. Enter the **amount** for 'REPETITION.' In this example, enter '4.00,' because the period of tax repetition for a fractional portion ending in '.75' is '4.00.''

6. Enter the **amount** in 'TAX.' In this example, enter '0.31,' arrived at by multiplying the period of tax repetition by the tax percentage. In this example, $4.00 x 7.75% = 0.31.

7. Click '**+**' to add a breakpoint for the amount of '0.00,' and then click '+' again to add the first breakpoint from your tax table.

NCR Silver Pro Restaurant Tax Table Entered Values	Florida 7.75% Tax Table Example

Florida 7.75% Tax Table Example:

Amount of Sale			Tax
0.10	-	0.12	0.01
0.13	-	0.25	0.02
0.26	-	0.38	0.03
0.39	-	0.51	0.04
0.52	-	0.64	0.05
0.65	-	0.77	0.06
0.78	-	0.90	0.07
0.91	-	1.03	0.08
1.04	-	1.16	0.09
1.17	-	1.29	0.10
1.30	-	1.41	0.11
1.42	-	1.54	0.12
	-		0.13
2.97	-		0.24
3.10	-	3.22	0.25
3.23	-	3.35	0.26
3.36	-	3.48	0.27
3.49	-	3.61	0.28
3.62	-	3.74	0.29
3.75	-	3.87	0.30
3.88	-	4.09	0.31

8. Referring to the Florida tax table, enter the **starting sales amount** for the breakpoint. For example, if the sales range for the breakpoint is '.10' to '.12,' you only need to enter '.10.' The system automatically enters the amount for the TAX column.

9. Click '+' to move to the next breakpoint. In this scenario, the system inserts a breakpoint at the beginning of the table to account for the sales amounts less than '.10,' and the breakpoint you just entered becomes the second breakpoint.

10. Repeat for as many **breakpoints** as necessary. In this example, the period of repetition is 4.00. Enter breakpoints up to the sales amount of '$4.09.'

11. Click **Save Changes**. Refer to 'Setting Up a Tax Category' for how to specify a tax table for a tax category.

MARYLAND TAX TABLE SCENARIO: **You are subject to the Maryland 6% tax rate, which taxes the first dollar differently than subsequent dollars.'**

1. Select **Settings > Taxes**.

2. Click **Add Tax Table**.

3. Type a **name** for the tax table, such as 'Maryland 6.00%.'

4. Enter the **amount** for 'START.' In this scenario, enter '1.00,' to indicate the tax calculation changes after the first '$1.00' of sales.

5. Enter the **amount** for 'REPETITION.' In this scenario, enter '1.00,' because the period of tax repetition for a fractional portion ending in '0' is '1.00.'

6. Enter the **amount** in 'TAX.' In this scenario, enter '0.06,' arrived at by multiplying the period of tax repetition by the tax percentage. In this example, $1.00 x 6.00% = .06.

7. Click '**+**' to add a breakpoint for the amount of '0.00,' and then click '**+**' again to add the first breakpoint from your tax table.

   When entering breakpoints for tax tables which include a start of tax repetition, it is necessary to enter the breakpoints for the values before the start of tax repetition, known as non-repeating breakpoints, and for the breakpoints until the repetition occurs, known as repeating breakpoints. In this scenario, it is necessary to enter non-repeating breakpoints up to '1.00,' when the period of repetition begins, and from '1.00' to '2.00,' when the tax table begins to repeat. You only need to enter the breakpoint and tax amounts. NCR Silver Pro determines whether the breakpoint is repeating or non-repeating.

NCR Silver Pro Restaurant Tax Table Entered Values	Maryland 6% Tax Table Example

Taxable Sale		Tax
-----	- .20	.01
.21	- .33	.02
.34	- .50	.03
.51	- .66	.04
.67	- .83	.05
.84	- 1.00	.06
1.01	- 1.16	.07
1.17	- 1.33	.08
1.34	- 1.50	.09
1.51	- 1.66	.10
1.67	- 1.83	.11
1.84	- 2.00	.12

8. Referring to the Maryland tax table, enter the **starting sales amount** for the breakpoint. For example, if the sales range for the breakpoint is '- - -' to '.20,' you only need to enter '.01.' The '- - -' is equivalent to '0.00,' which is not a valid sales amount; therefore, it is necessary to begin with '0.01.'

9. Enter the **applicable tax** for the sales amount entered in step 8. In this scenario, enter '.01.'

10. Click '**+**' to move to the next breakpoint. In this scenario, the system inserts a breakpoint at the beginning of the table to account for the sales amounts less than '.01,' and the breakpoint you just entered becomes the second breakpoint.

11. Repeat for as many **breakpoints** as necessary.

    In the Maryland tax table example, add as many breakpoints as needed to get to the start of repetition, which we determined is $1.00. As you enter the breakpoints, the system determines the entries are non-repeating until you reach the '$1.00' breakpoint. Continue adding breakpoints for the period of repetition, which, based on the fractional portion of the tax rate, is one additional dollar. In this example, you would enter breakpoints up to $2.00. As you enter the breakpoints for the period of repetition, the system determines these are repeating breakpoints.

    If the fractional tax portion of the tax rate was .25%, then your period of repetition would be $4.00. You would enter breakpoints up to $5.00; since the start of repetition does not begin until $1.00.

12. Click **Save Changes**. Refer to 'Setting Up a Tax Category' for how to add a tax table to a tax category.

PAYMENTS

NCR Silver Pro Restaurant enables you to accept payments from a variety of sources and integrates with multiple payment processors. Contact NCR Customer Care at 1-877-270-3475 to configure your credit card payment processing.

NCR Silver Pro Restaurant uses integrated credit, non-integrated credit, and EMV for payment processing.

- With **integrated credit**, you use an NCR system-approved processor, which allows you to use a credit card reader connected to your device.

- With **non-integrated credit**, you use a non NCR-approved merchant processor, which requires you to use a stand-alone credit card reader.

- With **EMV**, you use an EMV approved processor, which requires you to use a stand-alone EMV card reader. Gift cards, Offline credit, and Save Credit Card to Order are not available with EMV. Refer to the NCR Silver Pro Restaurant EMV Quick Reference Guide for information about EMV.

On occasions without Internet connectivity, NCR Silver Pro Restaurant provides the option to accept credit cards as offline transactions, except when using EMV.

Prior to configuring your payments, you must provide a VAR sheet from your processor to Silver Customer Care for input.

CONFIGURING INTEGRATED AND NON-INTEGRATED CREDIT PAYMENT PROCESSING

1. Select **Settings > Payments**.

2. Select **Payment Methods**.

3. Select **Allow for manual card entry** to provide you with the option to enter a customer credit card number manually, instead of sliding the card. If you select this method, you might be subject to higher processing fees.

4. Select **Allow for credit card tips** to provide your customers the option to include a tip amount when paying with a credit card.

5. Type an **amount** for which you want to require a signature for credit card purchase. Type '0.00' to always require the signature of a customer for a credit card purchase. For faster checkouts, type the minimum dollar amount at which you want to require the signature of a customer. This is also available for EMV.

6. Select **Allow for Save Credit Card to Order** to allow you to temporarily store a credit card for a customer tab. When you enable this option, a prompt appears. Tap **OK.** The transaction appears as a manually entered card, and eCommerce rates, which are typically higher, apply to the transaction.

   This feature is only available with integrated credit.
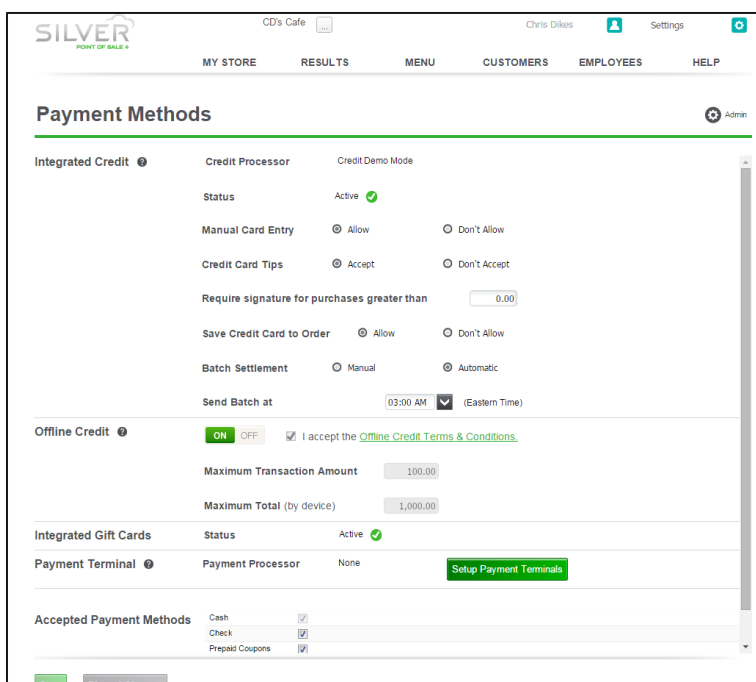
7. Choose a **Batch settlement option**. With 'Manual,' it is necessary for you to manually upload the batch settlement for payment processing; whereas 'Automatic' sends the batch settlement file to the payment processor automatically at the time you designate.

8. (Optional) Click **I accept the Offline Credit Terms & Conditions** to enable offline credit. Only an employee with Account Manager access can activate offline credit for a store. NOTE: See the Offline Credit section for more detailed information.

   - Accept the **terms and conditions** for offline credit. The Offline Credit configuration options appear.

   - Type the **maximum transaction amount** to allow for each guest check.

   - Type the **maximum dollar amount** to allow each device to accept for offline credit transactions. For example, if you set the limit at '$100.00,' the device cannot accept more than one hundred dollars total in offline credit transactions.

9. Integrated Gift Cards is a view only field. 'None' means gift cards are not set up, and 'Active' means gift card setup is complete. Contact NCR Customer Care for assistance in setting up Integrated Gift Cards, if necessary.

10. Select the **forms of payment** you accept at your restaurant.

11. Click **Save.**

CONFIGURING EMV

To configure EMV in Silver Back Office, you must log in with the Account Manager user role.

IMPORTANT: If you previously configured integrated or non-integrated credit card processing, make sure all batches have settled before switching to EMV. Otherwise, unsettled batches will not process.

1. In Silver Back Office, select **Settings > Payments**.

2. Click **Setup Payment Terminals**.

    If you previously configured card processor information, a warning prompt appears. Click **Continue**. The Payment Terminals screen appears.

3. Click **Add a Terminal**.

4. Type the **last three digits of the terminal serial number**, located on the back of the device.

5. Type the **terminal id**, provided to you by the processor.

6. Type the **transaction key**, a sixteen-character alphanumeric key provided to you by the processor.

7. Click **Save Changes**.

8. Click **Close** to return to the Payment Methods screen.

NEXT STEP: Configure each iPad for each EMV device.

OFFLINE CREDIT
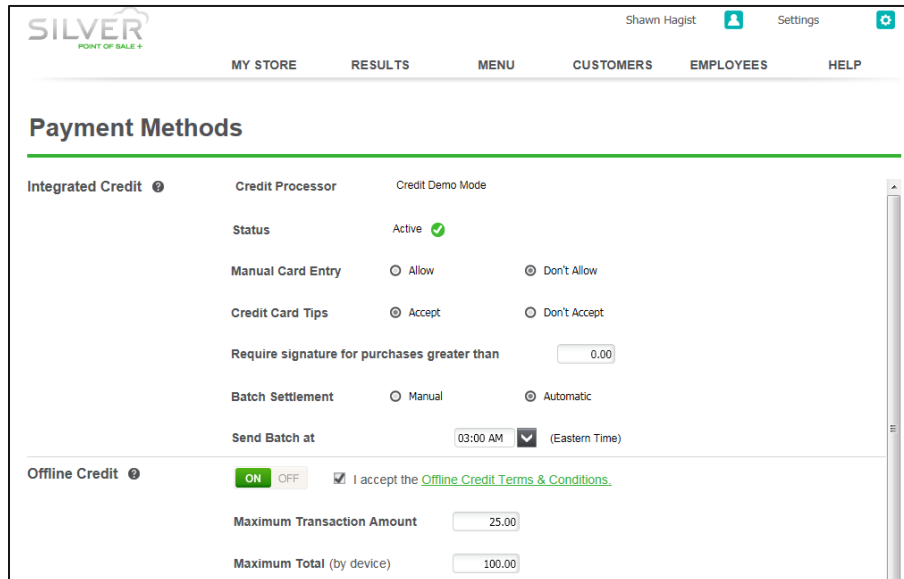
Offline credit enables you to accept credit cards for payment without an active Internet connection. In this type of scenario, NCR Silver Pro Restaurant does not seek authorization for the credit card with the merchant processor. When you regain Internet connectivity, and a user logs in to the POS app, the system submits the pending offline credit card transactions for approval to the merchant processor. You can choose to use offline credit as a convenience for your customers; however, there is some risk that the merchant processor may decline the credit card when you submit it for authorization. This section documents how to configure your system to accept offline credit transactions, how to view and manage your offline credit card transactions, and the report available to you for tracking.

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

Since the offline credit feature involves some financial risk, the feature is not immediately visible for configuration. It is necessary to first contact customer care at 877-270-3475 to activate the feature on your account for configuration. Once you have done so, you may proceed with the steps below. Only a user with the Account Manager level of access can configure the offline credit feature.

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

2. Select **Settings > Payments**.
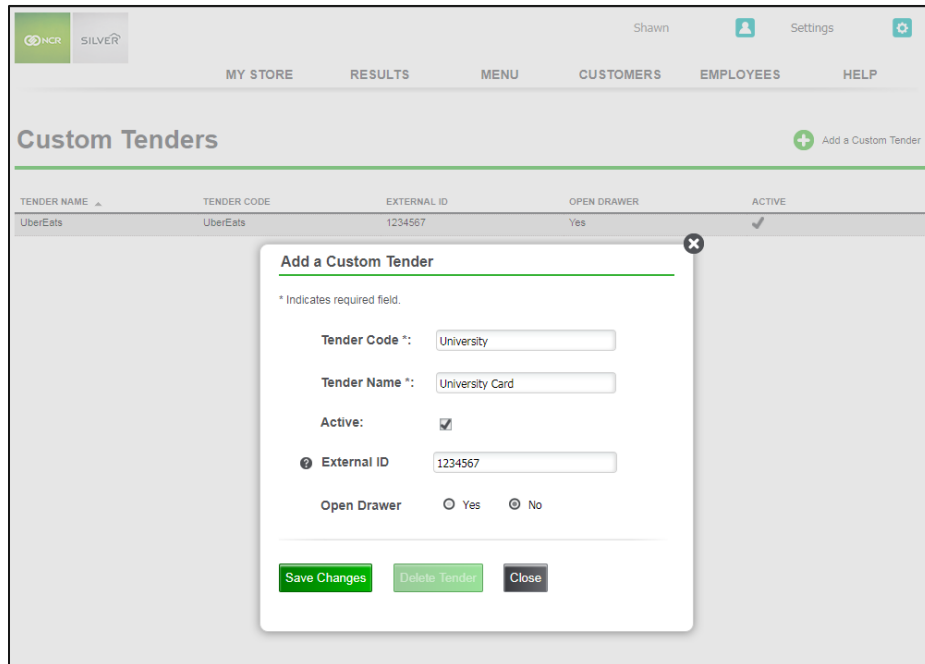
3. Under 'Offline Credit,' click **On** to activate offline credit. The system displays the 'Offline Credit terms and conditions' screen.

4. Accept the **terms and conditions** for offline credit. The Offline Credit configuration options appear.

5. Type the **maximum transaction amount** to allow for each guest check.

6. Type the **maximum dollar amount** to allow each device to accept for offline credit transactions. For example, if you set the limit at '$100.00,' the device cannot accept more than one hundred dollars total in offline credit transactions.

7. Click **Save**.

CREATING CUSTOM TENDERS

You can create your own, custom payment tender types in the Silver Back Office. Custom tenders are a good way to handle closing tickets with generic payment type like a university meal plan or closing delivery orders handled by 3rd party delivery services. To set up custom tenders:

1. Log into **Silver Back Office** through a web browser.

2. Select **Settings > Custom Tenders**.

3. Click **Add a Custom Tender**
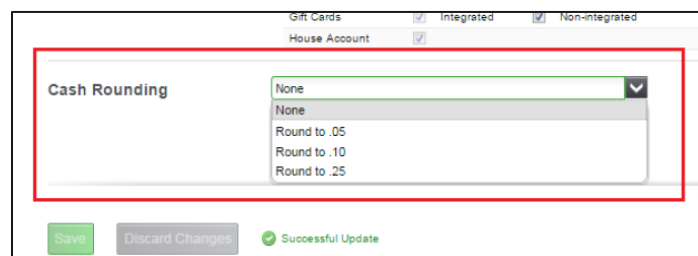
4. Enter a **Tender Code**, which is the name that displays on the POS tender screen.

5. Enter a **Tender Name**, which is a long description of the custom tender type.

6. Click the checkbox to mark as **Active** on the POS.

7. Select **Yes** to have the cash drawer open when this tender is used or **No** if the cash drawer should remain closed.

8. (Optional) Enter an external ID to match your custom tender to any external systems you may use.

9. Click **Save Changes**.

10. Note that for multi-store users, custom tenders can only be deleted at the company level.

CASH ROUNDING

NCR Silver Pro Restaurant Edition allows cash transactions to be rounded to the nearest $0.05, $0.10, or $0.25. This is most beneficial in countries such as Canada that no longer have a 1 cent currency. The setting is set to "None" by default.

1. Log into **Silver Back Office** through a web browser.

2. Select **Settings > Payments**.

3. Use the dropdown menu under Cash Rounding to change the setting.

4. Click save

PAY IN/OUT CODES

NCR Silver Pro Restaurant includes a number of Pay In/Out codes for you to use when adding and removing cash from the drawer. In addition to the default Pay In/Out codes, you can add your own codes. Pay in and Pay out are petty cash accounts and the system posts transactions involving these accounts to the Shift End report of the employee active on the device when the transactions occurred.

5.   Select **Settings > Pay In/Out Codes**.

6.   Click **Add a Pay In/Out Code**. The Pay In/Out Reason Code screen appears.

7.   Type the **name** for the code.

8.   Type the **description** for the code.

9.   Select **Pay Out** or **Pay In** to identify the code reason.

10. Click **Save Changes**.

CHARGES

Charges allow you to add non-sales revenue items to an order, such as a delivery charge, membership fee, bottle deposit, or another miscellaneous fee. You can manually add charges to a guest check, or you can assign a charge to an order mode, such as takeout or delivery, which will cause the system to automatically add the charge every time you select the order mode. A Charges button appears on the payment screen to enable you to manually add a charge to a guest check.

NCR Silver Pro Restaurant reports charges on the Store Summary report as a separate line item and outside of the net sales calculation.
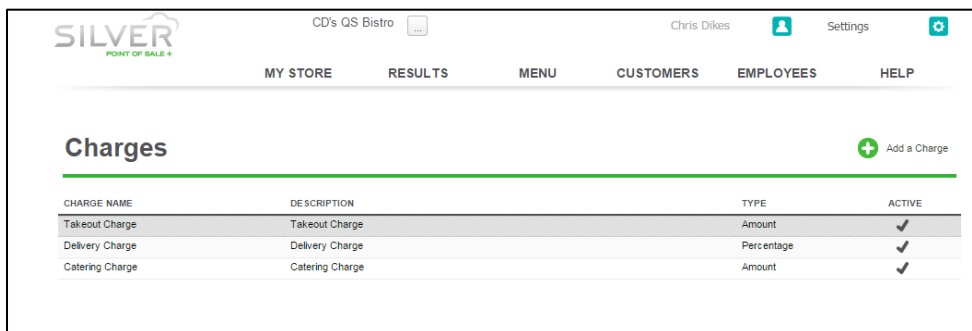
With charges, NCR Silver Pro Restaurant adds two new access levels. One, 'Charges,' controls which users can access the Charges page in Silver Back Office, and the other, 'Add Charge to a Ticket,' controls which users can manually add a charge to a guest check. Review your user roles to ensure the appropriate access levels are assigned.

Regarding charges:

• You can price charges in one of three ways: a defined flat amount, a prompt for price, or as a percentage of the ticket subtotal.

• Charges appear as a line item on the guest check.

• You must assign a tax category to a charge.

• You can deactivate a charge without deleting it.

- You can add manually add a charge to a guest check and adjust the quantity of the charge. For example, if you require a bottle deposit on growlers and a customer orders three, you can add the bottle deposit charge and increase the quantity to '3.'

- Upon adding a charge to a ticket, the system considers the charge finalized. If you remove a charge, the system considers the action a void. If the removed charge was percentage based, the voided amount reflects the charge at the time of the void.

- When multiple charges appear on a guest check, the system ignores the other charges when calculating a percentage based charge.

- You can apply an item level discount to a charge, but you cannot apply a ticket level discount to a charge.

- You can identify a charge as 'House Account,' which allows the charge to be used for house account payments at the POS.

A checkmark underneath the active column indicates whether the charge is active or not.

Once you configure your charges, you can assign a charge to an order mode so the charge applies automatically when the order mode is applied.
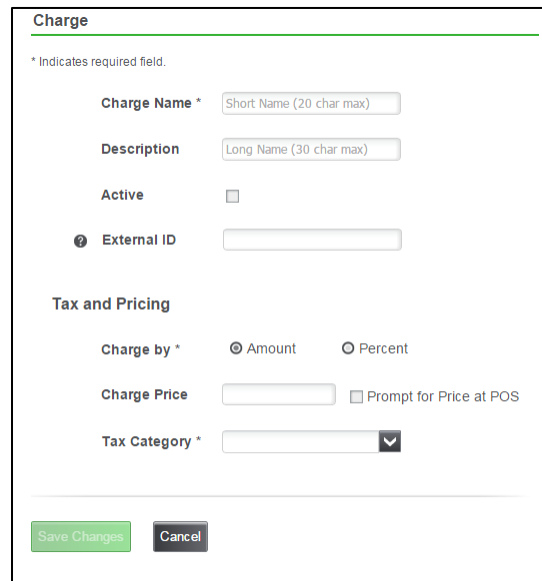
For multi-site operations, you configure charges at the company level. You cannot create or edit charges at the store level.

CONFIGURING CHARGES

You can add, edit, deactivate, and delete a charge.

To add a charge:

1. In Silver Back Office, select **Settings > Charges**. The Charges screen appears.
2. Click **Add a Charge**. A Charge popup appears.

Charge

* Indicates required field.

Charge Name *   Short Name (20 char max)

Description   Long Name (30 char max)

Active   ☐

❓ External ID   [   ]

Tax and Pricing

Charge by *   ⦿ Amount   ○ Percent

Charge Price   [   ]   ☐ Prompt for Price at POS

Tax Category *   [▼]

[Save Changes] [Cancel]

3. Type a **name** for the charge.

4. (Optional) Type a **description** for the charge.

5. Select **Active** to activate the charge.

6. (Optional) Type an **External ID number** for the charge. If you leave External ID blank, the system automatically assigns an External ID to the charge after you save the record.

7. (Optional) Select **House Account** to enable the charge to be used for house account payments at the POS.

8. Under 'Tax and Pricing,' select the **method** by which to assess the charge, either **amount** or **percentage**.

   - If you select **Amount**:

     o For a flat amount charge, type the **dollar amount** for the charge.

     o For a prompt for price charge, meaning a popup will appear on the POS and you will enter the amount of the charge, leave the **charge price** blank and select **prompt for price**.

   - If you select **Percent:**

     o Enter the **charge percentage** to use.

     o (Optional) Enter the **minimum price** for the charge. For example, you enter the minimum price as $2.00 and the charge percentage as 10%. If a guest check subtotal is $5.00, rather than the charge being .50, it will be $2.00, which is the minimum amount.

     o (Optional) Enter the **maximum amount** for the charge. For example, you enter the maximum price as $10.00 and the charge percentage as 10%. If a guest check subtotal is $500.00, rather than the charge being $50.00, it will be $10.00, which is the maximum amount.

     o (Optional) Enter the **closest amount** for which to round the charge amount. For example, the rounded amount is .10. If the charge amount is $1.07, the system will round the charge to the nearest .10. In this example, the charge will be $1.10.

     o (Optional) Configure percentages to the second decimal place. For example, 2.5% can now be 2.75%.

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

10. Click **Save**.

To edit a charge:

1. In Silver Back Office, select **Settings > Charges**.

2. Select the **charge** you want to edit. The Edit Charge screen appears.

3. Make the necessary edits.

4. Click Save Changes.

To deactivate a charge:

The system allows you to deactivate a charge, even if it is assigned to an order mode.

1. In Silver Back Office, select **Settings > Charges**.

2. Select the **charge** you want to deactivate. The Edit Charge screen appears.

3. Clear the **Active selection**.

4. Click **Save Changes**.
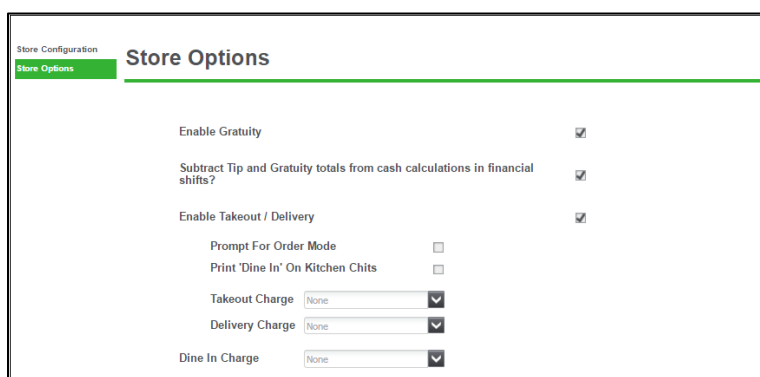
To delete a charge:

The system will allow you to delete a charge, even if it is assigned to an order mode.

1. In Silver Back Office, select **Settings > Charges**.

2. Select the **charge** you want to delete. The Edit Charge screen appears.

3. Select **Delete Charge**. A prompt appears.

4. Click **OK**.

ASSIGNING A CHARGE TO AN ORDER MODE

After creating a charge, you can assign a charge to an order mode. When you do so, the POS automatically assigns the charge to the guest check when the order mode is selected.

To assign a charge to an order mode:

1. In Silver Back Office, select **Settings > Store > Store Options**.

2. Under 'Enable Takeout/Delivery,' select the **takeout charge** from the drop-down list.

3. Select the **delivery charge** from the drop-down list.

4. Select the **dine in charge** from the drop-down list.

5. Click **Save**.

To remove a charge from an order mode:

In some cases, you may decide to no longer automatically apply a charge to an order mode. You can remove the charge from the order mode.

1. In Silver Back Office, select **Settings > Store > Store Options**.

2. Under 'Enable Takeout/Delivery,' select **none** from the drop-down list of the order mode charge you want to remove.

3. Click **Save**.

KITCHEN ROUTING

Use Kitchen Routing to create and manage your kitchen printer groups and printers. Kitchen printer groups control how the system routes items to your kitchen printers. You assign items to kitchen printer groups. After you create your kitchen printer groups, you assign kitchen printers to them. You can also configure kitchen printers to consolidate like items on the kitchen chit. Once you create your kitchen printers in Silver Back Office, you must select the order modes for which you want those kitchen printers to print.

For example: You have a Kitchen Printer Group called 'Expo' and a Kitchen Printer called 'Printer 1' with only the order mode 'Takeout' assigned to it. For items assigned to the kitchen printer group 'Expo,' they will only print to 'Printer 1' when the Takeout Order mode is assigned to the ticket. If Dine-In or Delivery is selected, no kitchen chit will print.

After you setup your Kitchen Routing, you still must configure Kitchen printers in the POS app.
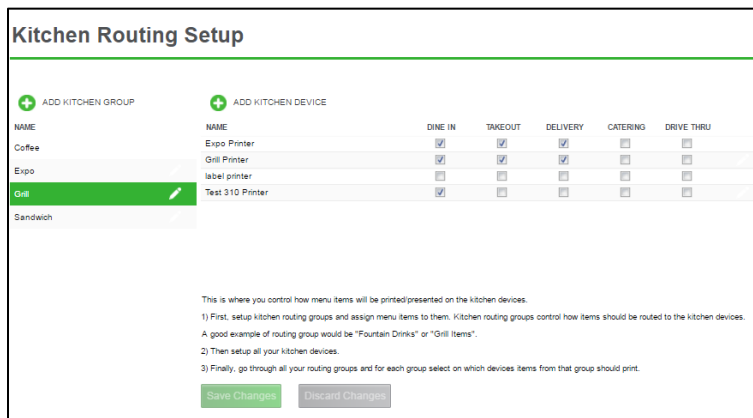
KITCHEN GROUPS	KITCHEN DEVICES	ORDER MODE
-Are assigned to items	-Are assigned to KITCHEN GROUPS and must have an order mode designated.	-Assigned to a kitchen printer.

To set up a kitchen printer group:

1. Select **Settings > Kitchen Routing**.

2. Click **ADD KITCHEN GROUP**. The Add Kitchen Printer screen appears.

3. Type a **name** for the kitchen group.

4. Click **Save Changes** and continue to the next procedure.

To set up a kitchen device:

1. Click **ADD KITCHEN Device**. The Add Kitchen Printer screen appears.

2. Type a **name** for the kitchen printer.

3. If this is a label printer, click **Label Printer.** The **one Item Per Chit** option will automatically be checked.

4. Click **Consolidate Items on Chit** to combine like items on a kitchen chit. For example, with consolidate on, the system prints:

> Date and Time
>
> (2) Cheeseburger
>
> > NO LETTUCE,
>
> With consolidate off, the system prints:
>
> Cheeseburger
>
> > NO LETTUCE
>
> Cheeseburger
>
> > NO LETTUCE

5. Select **One item per chit** to only have one menu item print on each kitchen chit.

6. Click **Save Changes** and continue to the next procedure.

To associate a kitchen device with a kitchen printer group:

1. Select a **kitchen group** from the group list on the left side of the screen.

2. Select the **order mode** for the printers to associate with the printer group. For example, select 'DINE-IN' for the Bar printer group.

3. Click **Save Changes**.

RESULTS

The RESULTS menu heading includes links to REPORTS, POS TRANSACTIONS, LABOR SHIFTS, FINANCIAL SHIFTS, and CREDIT SETTLEMENT.

REPORTS

The reports in Silver Back Office enable you to analyze and monitor your restaurant. NCR Silver Pro divides the Silver Back Office reports into four sections: Operations, Sales, Customers, and Lists. All of the reports, except for lists, allow you to customize the time period for the report. You can either print the reports, or export the reports into several different formats.

KEY BENEFITS OF THE SILVER BACK OFFICE REPORTS

The following is a list, in menu order, of the NCR Silver Pro reports available to you and their key benefits:

Report	Description
Store Summary	Provides you with a summary of your sales activity for a selected time period.
Device Activity	Enables you to review the sales activity entered through each device.
Employee Activity	Enables you to review the sales activity entered by each employee.
Location Activity	Enables you to review the sales activity for each location.
Discounts and Promos	Provides you with an overview of the discounts and promotions redeemed in your restaurant.
Taxes	Provides you with a breakdown of the taxes collected by tax jurisdiction.
Labor Shifts	Enables you to review the times your employees clock in and out and the total hours worked for a selected time period.
Tips	Provides a report of the total amount of credit card tips declared by an employee.
Offline Credit	Enables you to review the offline credit transactions and their settlement status.
Void Audit	Provides you with a list and amount of the voided and cleared items entered by each employee according to date and transaction.
Department Sales	Enables you to track the sales activity for each department.
Item Sales	Enables you to track the sales activity for each item.
Modifier Sales	Enables you to track the sales activity for each modifier.

Sales Summary	Provides you with an overview of your sales and enables you to look for sales trends.
Hourly Sales	Provides you with a breakdown of your sales by hour and enables you to look for sales trends.
Bulk Email	Enables you to track the effectiveness of your marketing email messages.
Customer Notes	Displays the notes entered for your customers.
Customer Sales	Provides you with a sales summary by customer.
House Accounts	Provides you with a list of house accounts.
House Accounts Activity	Enables you to view the activity for all of your house accounts.
Items	Displays all of the items on your menu according to category.
Customers	Displays a list of all of your customers.
Employee List	Displays a list of active employees with their user role and contact information.
Devices	Displays a list of all devices associated with your restaurant.

ACCESSING A REPORT

You can easily access and run a report in Silver Back Office.
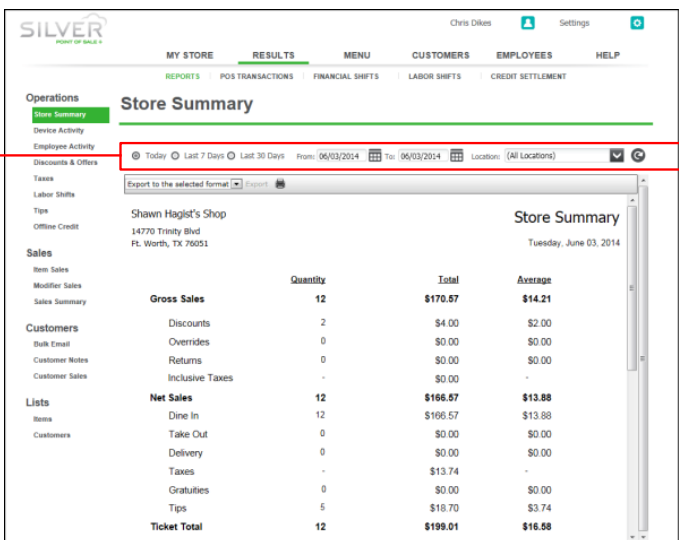
1. Log in to **Silver Back Office** through a Web browser.
2. Select **Results > Reports**.
3. Click the **report** you want to run. When you select a report, the system automatically generates the report. If you configure the report, such as the time period, or add a filter to the report, click 🔄 to refresh the report data.

CHOOSING A REPORT DATE RANGE

The reports in Silver Back Office allow you to select a specific date or date range to run the report. The Reports function contains pre-configured dates and date ranges for you to use, or you can select your own date or date range.

To select a date range for the report:

1. On the Reports menu, select a **report** to run. The system generates the report in the Report Preview screen.

date range selection

2. Select one of the pre-**configured date ranges**, such as 'Today,' 'Yesterday,' 'Last 7 Days,' and 'Last 30 Days.'

    -OR-
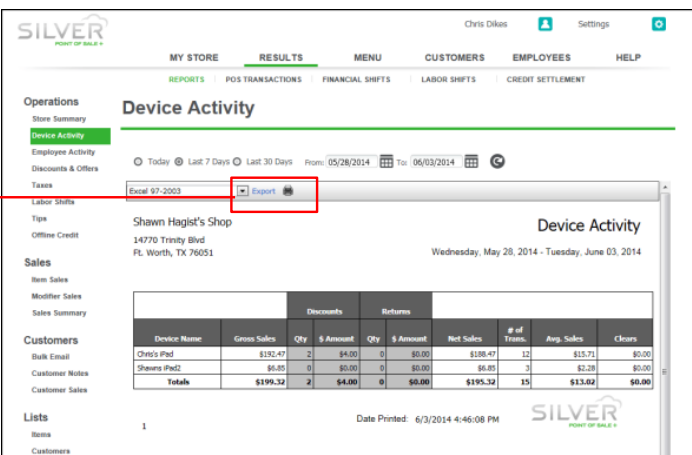
    Under 'From,' and 'To,' use the **right** and **left arrows** to select a **start** and **end date**.

3. Click ⟳ to refresh the report data. The report appears in the Report Preview screen.

EXPORTING REPORT DATA

You can export each report in Silver Back Office to a variety of file formats. For example, you may want to export your Customers list to an Excel file to create a 'Mail Merge' with Microsoft® Word®.

1. On the Reports menu, select, configure, and generate a **report**. The report appears in the Report Preview screen.

2. In the Report Preview toolbar, select a **format** to which to export your report data from the drop-down list.

Export button

3. Click **Export**. A Windows prompt appears.

4. Click **Save As** from the drop-down list at the bottom of the screen. The 'Save As' screen appears.

5. Navigate to a **folder** on your system to save the file.

6. Type a **file name** that best meets your operational needs.

7. Click **Save**.

STORE SUMMARY REPORT

The Store Summary report enables you to review a summary of your sales activity for a selected time period. You can view such things as gross sales, net sales, payment types, discounts, price overrides, and more. If you operate multiple locations, the Store Summary report defaults to All Locations; however, you can filter the report to display only the results of one location.

1. On the Reports menu, select **Store Summary**. The system generates a report for All Locations for Today.

2. For restaurants with multiple locations, click ⌄ to select a **location** from the drop-down list.

3. Click ⟳ in the Report Preview toolbar to refresh the data. The report appears in the Report Preview screen.

CD's Cafe — 14770 Trinity Blvd, Fort Worth, TX 76155 — **(1)**

Store Summary — Tuesday, July 21, 2015

	Quantity	Total	Average
Gross Sales (2)	16	$306.85	$19.18
Gross Refunds	1	$30.00	$30.00
Discounts & Promos	9	$21.53	$2.39
Overrides	0	$0.00	$0.00
Inclusive Taxes	-	$1.14	-
Net Sales (3)	16	$254.18	$15.89
Dine In	13	$167.18	$12.86
Take Out	1	$40.00	$40.00
Delivery	2	$47.00	$23.50
Taxes	-	$23.20	-
Gratuities	2	$14.00	$7.00
Tips	5	$35.56	$7.11
Gift Cards Sold (4)	2	$90.00	$45.00
Gift Cards Discounts	1	$6.00	$6.00
Charges	3	$15.00	$5.00
Charges Discounts	1	$2.00	$2.00
Ticket Total (5)	17	$423.94	$24.11

Payment Types (6)	Quantity	Tip Amount	Amount	Total Amount
CASH	7	$0.00	$152.40	$152.40
CREDIT	8	$35.56	$219.20	$254.76
PrePaid	1	$0.00	$16.78	$16.78

(7)	Quantity	Amount
Payins	0	$0.00
Payouts	2	$25.00
Cash Deposits	2	$77.84

Charges (8)	Quantity	Charge Amount
Takeout A	1	$5.00
Delivery	2	$10.00

Tax Categories (9)	Rate %	Taxable Subtotal	Amount
Alcohol Tax	8.2500	$13.86	$1.14
Food Tax	8.2500	$153.32	$12.65
Food Tax - Delivery	8.2500	$55.00	$4.54
Food Tax - Takeout	8.2500	$45.00	$3.71
Gratuity Tax	8.2500	$14.00	$1.16

Discount & Promotion Names (10)	Quantity	Discount Amount
$5 Off	1	$5.00
$5Off your first visit	1	$5.00
% Off Item	4	$8.63
2 off item	1	$2.00
amount prompted	3	$4.00
Large Wiches Meal Deal	1	$4.90

Voids (11)	Quantity	Voided Amount
Cleared Items	73.28	$286.61
Voided Items	49	$147.25

Labor (12)	Labor %
$0.00	0.00%

Guest Counts (13)
17

#	Column	Description
1	Header	Header includes: • The name and address of the store. • The selected time period for the report. • The name of the report.
2	Gross Sales	Gross Sales calculates your total number of sales tickets and your total amount of sales before gross refunds, discounts, overrides, and inclusive taxes. For each line item in the Gross Sales section, the system summarizes as follows: Gross Refunds — The total number of refund tickets, the total amount of refunds, and the average refund amount per ticket. Discounts — The total number of discounts, the total amount of discounts, and the average discount amount per ticket. The total number of discounts includes Gift Cards Discounts, but the total amount of discounts does not. The Discounts section of the report provides a breakdown of the discounts. Overrides — The total number of overrides, the total amount of overrides, and the average override amount per ticket. Inclusive Taxes — The total amount of inclusive taxes collected.
3	Net Sales	Net Sales calculates your total number of sales tickets and your sales amount after subtracting gross refunds, discounts, overrides, and inclusive taxes. For each order mode, the system summarizes the total number of tickets, the total amount of net sales, and the average dollar amount per ticket. You will also see a breakout of the order types used in Net Sales.
4	Miscellaneous Items	The Miscellaneous Items section summary includes: Taxes — The total amount of taxes collected. Gratuities — The total number of tickets with gratuities, the total amount of gratuities, and the average gratuity amount per ticket. Tips — The total number of tickets with credit card tips, the total amount of credit card tips, and the average credit card tip amount per ticket. Gift Cards Sold — The total number of gift cards sold, the total amount of gift cards, and the average gift card amount. Gift Cards Discount — The total number of gift card discounts, the total amount of gift card discounts, and the average gift card discount amount.

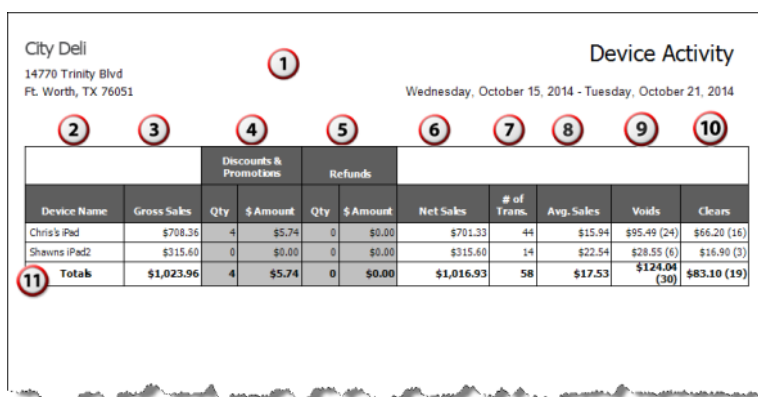|		
		Charges— The total number of charges applied, the total amount of charges, and the average charge amount.
		Charges Discounts — The total number of charges discounts, the total amount of charges discounts, and the average charge discount amount.
5	Ticket Total	The Ticket Total summary includes: • The total number of tickets, calculated as: Gross Sales tickets + Gross Refunds tickets. • The total amount of sales, calculated as: Net Sales + Taxes + Gratuities + Tips + Gift Cards Sold - Gift Cards Discounts + Charges -Charges Discounts. • The average dollar amount per ticket.
6	Payment Types	Payment Types includes a summary of payments received by tender. The summary includes: • The number of tickets. • The total amount of tips received. • The total amount of the sale, not including tips. • The total amount of the transaction, including tips.
7	Cash Transactions	Cash Transactions includes a summary of your cash transactions by transaction type. The summary includes: • The name of the cash transaction. • The number of cash transactions by type. • The total amount of cash transactions by type.
8	Charges	Charges summarizes the charges assessed. The summary includes: • The name of the charge. • The total amount assessed for the specified charge.

9	Tax Categories	Tax Categories summarizes the collected sales taxes according to category. The summary includes:
		• The name of the tax category.
		• The tax rate for the category.
		• The sum subtotal of all transactions for the tax category.
		• The total amount collected for the tax category.
10	Discount & Promotion Names	Discount & Promotion Names summarizes the discounts and promotions redeemed by discount and offer. The summary includes:
		• The name of the discount and offer.
		• The total number of discounts and offers redeemed by discount.
		• The total amount of money discounted by discount.
11	Voids	Voids summarizes the items deleted. The summary includes:
		• The total number of clears.
		• The total dollar amount of the cleared items.
		• The total number of voids.
		• The total dollar amount of the voided items.
12	Labor	Labor summarizes the cost of labor. The summary includes:
		• The total dollar amount of hourly labor.
		• The percentage of hourly labor costs relative to net sales. The system calculates the percentage as follows: Total labor amount divided by total net sales.
13	Guest Counts	(Table Service only) The total number of guest counts, calculated as the total number of seats on a ticket.

DEVICE ACTIVITY REPORT

The Device Activity report enables you to review the sales activity entered through each device. Use the report to identify terminals with exceptional sales, and to check for any unusual activity, such as excessive discounts or refunds. You can view the gross sales, the number and amount of discounts, the total number of transactions, the average sales per ticket, and more.

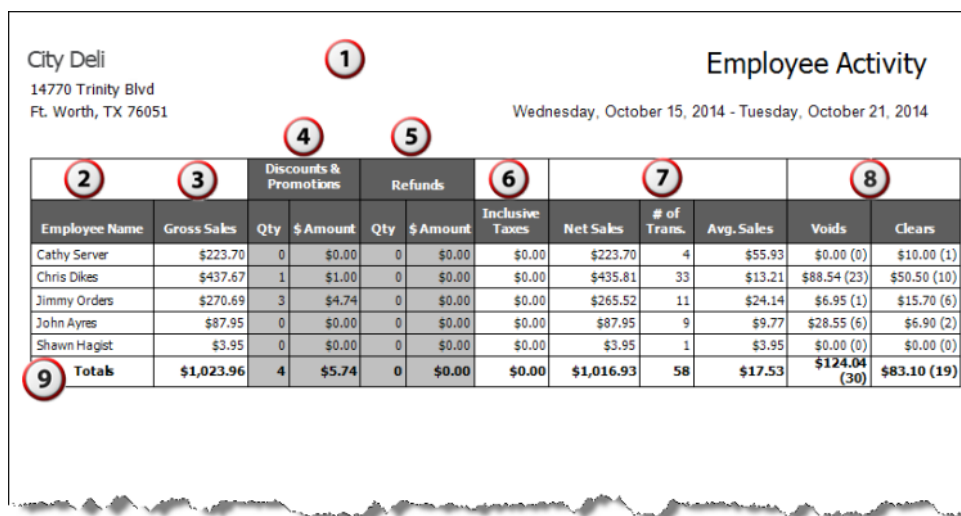| #	Column	Description
1	Header	Header includes: • The name and address of the store. • The selected time period for the report.
2	Device Name	The name of the POS device.
3	Gross Sales	The total amount of gross sales entered on the device.
4	Discounts & Promotions	The total number of discounts and promotions and the total amount of those discounts and promotions entered on the device.
5	Refunds	The total number of refunds and the total amount of those refunds entered on the device.
6	Net Sales	The total amount of net sales entered on the device.
7	# of Trans.	The total number of transactions entered on the device.
8	Avg. Sales	The average ticket amount per sale. The system calculates the average as net sales divided by the number of transactions.
9	Voids	The total amount of voids entered on the device, and, in parentheses, the total number of voids entered on the device.

10	Clears	The total amount of clears entered on the device, and, in parentheses, the total number of clears entered on the device.
11	Totals	The totals for each column.

EMPLOYEE ACTIVITY REPORT

The Employee Activity report enables you to review the sales activity for each employee. Use the report to identify employees with exceptional sales activity, and to check for any unusual activity, such as excessive discounts or refunds. You view the gross sales entered by employee, the number and amount of discounts and refunds, the number of sales, the average sales per transaction, and more.

#	Column	Description
1	Header	Header includes: • The name and address of the store. • The selected time period for the report. • The name of the report.
2	Employee Name	The name of the employee.
3	Gross Sales	The total amount of gross sales entered by the employee.
4	Discounts	The total number of discounts and promotions and the total amount of those discounts and promotions entered by the employee.
5	Refunds	The total number of refunds and the total amount of those refunds entered by the employee.
6	Inclusive Taxes	The sum total of inclusive taxes entered by the employee.

7	Net Sales	The Net Sales section includes: • The total amount of net sales entered by the employee. • The total number of tickets entered by the employee. • The average ticket amount per sale. The system calculates the average as net sales divided by the number of transactions.
8	Voids and Clears	The total number and amount of voids and clears entered by the employee.
9	Totals	The totals for each column.

LOCATION ACTIVITY REPORT

The Location Activity report enables you to review the sales activity for each location. Use the report to identify locations with exceptional sales activity, and to check for any unusual activity, such as excessive discounts or refunds. You view the gross sales entered by each location, the number and amount of discounts and refunds, the number of sales, the average sales per transaction, and more.

In multi-store, the Location Activity report is only available at the store-level.

For sites using Online Ordering, ONLINE appears as a location when an order has not yet been downloaded to the POS. Once an online order is processed on the POS, the information appears under the corresponding location which completed the order.

1. On the Reports menu, select **Location Activity**. The system generates a report for all locations.

2. Click ⌄ to display a drop-down list from which you can select a filter.

3. Click ↻ in the Report Preview toolbar to refresh the data. The report appears in the Report Preview screen.

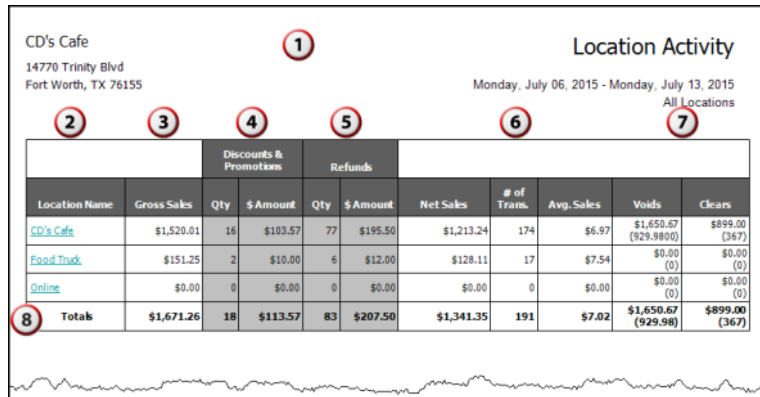| #	Column	Description
1	Header	Header includes: • The name and address of the store. • The selected time period for the report. • The name of the report.
2	Location Name	The name of the location.
3	Gross Sales	The total amount of gross sales entered at the location.
4	Discounts & Promotions	The total number of discounts and promotions and the total amount of those discounts and promotions entered at the location.
5	Refunds	The total number of refunds and the total amount of those refunds entered at the location.
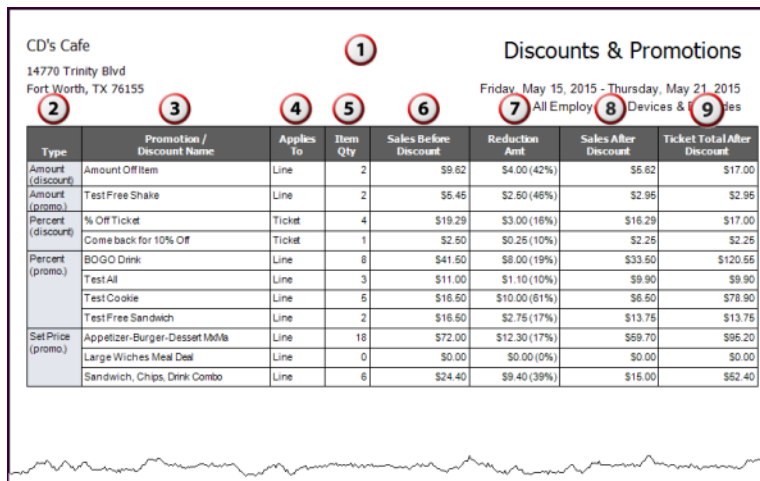
6	Net Sales	The Net Sales section includes: • The total amount of net sales entered at the location. • The total number of tickets entered at the location. • The average ticket amount per sale. The system calculates the average as net sales divided by the number of transactions.
7	Voids and Clears	The total number and amount of voids and clears entered at the location.
8	Totals	The totals for each column.

DISCOUNTS AND PROMOS REPORT

The Discounts and Promos report provides you with an overview of the discounts and promos redeemed in your restaurant for the selected time period. You can use this report to identify the sales generated by your discounts and promotions. You can filter the report by 'All Discounts & Promotions,' 'Employees,' 'Devices,' or 'Barcodes.'

1. On the Reports menu, select **Discounts and Offers**. The system generates a report for all discounts and offers.

2. Click ⌄ to display a drop-down list from which you can select a filter.

3. Click ⟳ in the Report Preview toolbar to refresh the data. The report appears in the Report Preview screen.

#	Column	Description
1	Header	Header includes: • The name and address of the store. • The selected time period for the report. • The name of the report.
2	Type	The type of discount or promotion.
3	Promotion/Discount Name	The name of the discount or promotion.
4	Applies To	Identifies whether the discount or promotion applied to an item on the check or to the entire ticket.
5	Item Quantity	The total number of items discounted.
6	Sales Before Discount	The total amount of sales prior to applying the discount.
7	Reduction Amount	The total amount of the discount applied.
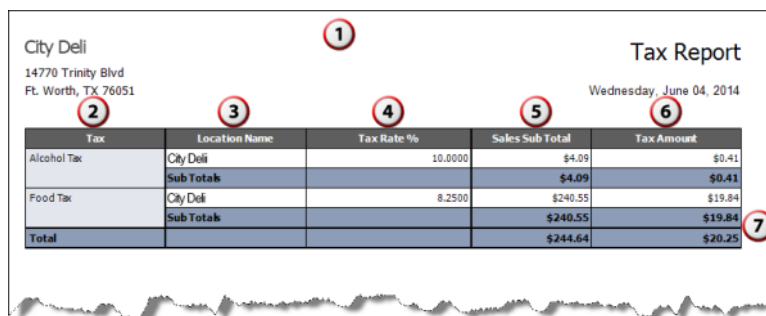
8	Sales After Discount	The total amount of sales after applying the discount or promotion.
9	Ticket Total After Discount	The total amount after applying discounts or promotions.

TAXES REPORT

The Taxes report provides you with a breakdown of the taxes collected by tax jurisdiction for a selected time period. If you sell at multiple locations, this report breaks down the tax information for each of your selling locations.

#	Column	Description
1	Header	Header includes: • The name and address of the store. • The selected time period for the report. • The name of the report.
2	Tax	The name of the tax category.
3	Location Name	The name of the location.
4	Tax Rate%	The tax rate percentage for the tax category.
5	Sales Sub Total	The total amount of sales for the tax category prior to assessing the sales tax.
6	Tax Amount	The total amount of the amount of sales tax collected for the tax category.
7	Total	The totals for each column.

LABOR SHIFTS REPORT

Labor Shifts enables you to review the times your employees clock in and clock out on the POS app and the total hours worked for a shift and a time period. By default, the report includes all employees; however, you can filter the report to only display a specific employee. You can also select Hide Punches to hide the Clock In section of the report.

A single '*' indicates an edit was made to the shift and two '**' indicate the shift includes a break.

1. On the Reports menu, select **Labor Shifts**. The system generates a report for all employees.

2. Click ⌄ to display a drop-down list of employees by which you can filter the report.

3. Click **Hide Punches** to only show a summary of hours worked for each employee, rather than each clock in and clock out for the selected time period.

4. Click ↻ in the Report Preview toolbar to refresh the data. The report appears in the Report Preview screen.

City Deli
14750 Trinity Blvd.
Ft. Worth, TX 76155

①

Labor Shifts

Sunday, April 06, 2014 - Saturday, April 12, 2014

② ③ ④

| Employee | Job Code | Clock In | | Total Hours | Pay | |
		Time In	Time Out		Total Pay	Declared Tips
Aaron Baker	Manager	4/12/2014 2:03 PM	4/14/2014 7:43 AM	41.67	0.00	0.00
Aaron Baker	Manager	4/11/2014 1:48 PM	4/12/2014 2:03 PM	24.25	0.00	0.00
Aaron Baker	Manager	4/8/2014 6:04 AM	4/11/2014 1:48 PM	79.74	0.00	0.00
Employee 'Aaron Baker' Total				145.66	0.00	0.00
John Smith	Cashier	4/12/2014 10:01 AM	4/12/2014 11:22 PM	13.35	113.50	0.00
John Smith	Cashier	4/11/2014 10:02 AM	4/12/2014 12:00 AM	13.95	118.61	0.00
John Smith	Cashier	4/10/2014 10:01 AM	4/10/2014 11:58 PM	13.95	118.54	0.00
John Smith	Cashier	4/9/2014 10:03 AM	4/9/2014 10:35 PM	12.54	106.58	0.00
John Smith	Cashier	4/7/2014 11:47 AM	4/7/2014 11:41 PM	11.90	101.16	0.00
John Smith	Cashier	4/6/2014 9:58 AM	4/6/2014 11:10 PM	13.19	112.12	0.00
Employee 'John Smith' Total				78.88	670.51	0.00
Bill Jones	Kitchen	4/12/2014 4:28 AM	4/12/2014 4:19 PM	11.85	97.74	0.00
Bill Jones	Kitchen	4/11/2014 4:31 AM	4/11/2014 2:44 PM	10.22	84.27	0.00
Bill Jones	Kitchen	4/10/2014 4:32 AM	4/10/2014 12:41 PM	8.16	67.33	0.00
Bill Jones	Kitchen	4/9/2014 4:27 AM	4/9/2014 12:37 PM	8.17	67.37	0.00
Bill Jones	Kitchen	4/6/2014 4:28 AM	4/6/2014 12:53 PM	8.42	69.44	0.00
Employee 'Bill Jones' Total				46.82	386.15	0.00
Annie Huff	Server	4/12/2014 10:00 AM	4/12/2014 2:02 PM	4.04	29.29	0.00
Annie Huff	Server	4/8/2014 2:01 PM	4/8/2014 9:56 PM	7.92	57.39	0.00
Annie Huff	Server	4/6/2014 2:06 PM	4/6/2014 10:31 PM	8.42	61.01	0.00
Employee 'Annie Huff' Total				20.38	147.69	0.00
Lori Magee	Server	4/10/2014 4:51 PM	4/10/2014 10:10 PM	5.32	38.60	0.00
Lori Magee	Server	4/8/2014 5:58 PM	4/8/2014 10:31 PM	4.54	32.93	0.00
Lori Magee	Server	4/8/2014 11:00 AM	4/8/2014 2:30 PM	3.50	0.00	0.00
Employee 'Lori Magee' Total				13.36	71.53	0.00
Jason Scott	Kitchen	4/12/2014 4:28 AM	4/12/2014 9:28 AM	5.01	36.31	0.00
Jason Scott	Kitchen	4/11/2014 4:31 AM	4/11/2014 12:47 PM	8.27	59.95	0.00
Jason Scott	Kitchen	4/8/2014 4:26 AM	4/8/2014 9:30 AM	5.07	36.72	0.00
Jason Scott	Kitchen	4/6/2014 4:28 AM	4/6/2014 9:23 AM	4.92	35.68	0.00
Employee ' Jason Scott' Total				23.27	168.66	0.00
Beth Tire	Bar	4/12/2014 1:57 PM	4/12/2014 11:16 PM	9.32	67.56	0.00
Beth Tire	Bar	4/11/2014 2:07 PM	4/11/2014 11:27 PM	9.33	67.67	0.00
Beth Tire	Bar	4/9/2014 6:03 PM	4/9/2014 10:31 PM	4.46	32.34	0.00
Beth Tire	Bar	4/7/2014 2:05 PM	4/7/2014 10:17 PM	8.19	59.40	0.00
Employee 'Beth Tire' Total				31.30	226.97	0.00

⑤

Date Printed: 4/16/2014 11:13:09 AM

SILVER
POINT OF SALE +

1

#	Column	Description
1	Header	Header includes: • The name and address of the store. • The selected time period for the report. • The name of the report.
2	Employee	The name of the employee.
3	Clock In	The Clock In section includes: • The job code for which the employee clocked in for the shift. • The time the employee clocked in. • The time the employee clocked out. • The total hours worked for the shift.
4	Pay	The Pay section includes: • The total pay earned by the employee. The system calculates the total pay by multiplying the hourly rate of the employee by the hours worked for the shift. • The total amount of credit card tips declared by the employee.
5	Total	The total number of hours worked, pay earned, and tips declared for each employee.
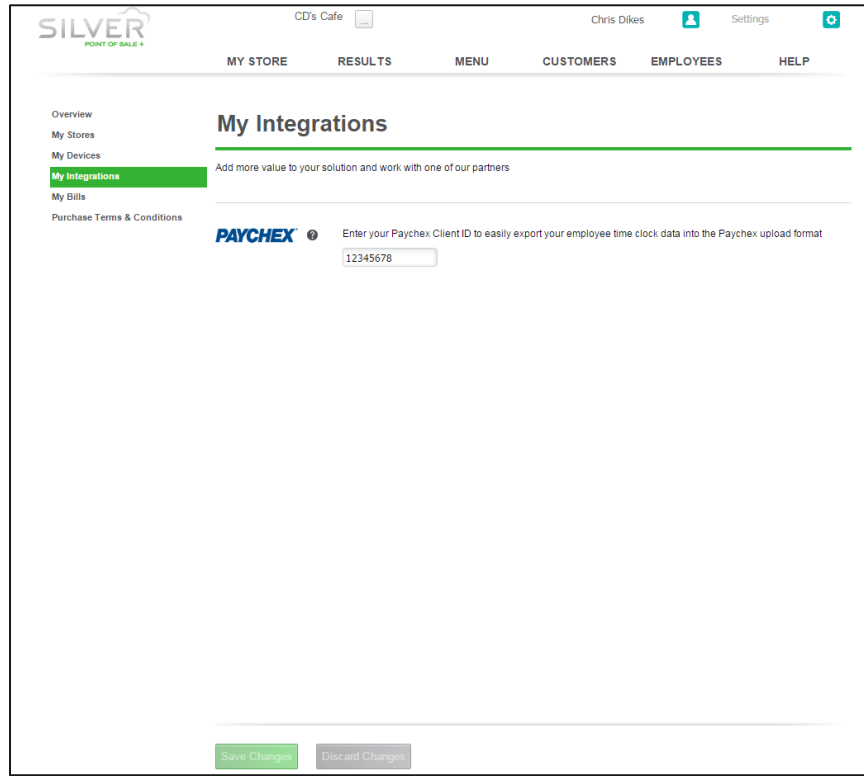
PAYCHEX INTEGRATION

NCR Silver Pro Restaurant provides a simple integration with Paychex that enables you to export a labor shift report in the format required by Paychex. You can then import the report into Paychex for your payroll processing.

CONFIGURING THE PAYCHEX CLIENT ID

Before you can export a labor shift report in the Paychex format, you first need to input your Paychex Client ID.

1. In Silver Back Office, click your **username** at the top right of the screen. A drop-down box appears.
2. Click **My Account**.
3. Click **My Integrations**.

4. Type your **Paychex Client ID**.

5. Click **Save Changes**.

EXPORTING THE LABOR SHIFT REPORT

With the Paychex Client ID configured, you can export a labor shift report which you can then import into Paychex.

The report:

- Contains data from the time period selected in the report filter.

- Contains a clock in and clock out for each employee.

- Does not provide a subtotal or total number of hours worked.

- Exports to a .csv file.

The export completes the following fields. All other fields remain blank.

- Client ID: The Paychex client ID you entered on the My integrations page.

- Worker ID: This is the Silver Pro Employee ID.

- Pay Component: "Regular"

- Hours: A numeric value.

To export the labor shift report for Paychex:

1. In Silver Back Office, select **RESULTS > REPORTS > Labor Shifts**.

2. Edit the **report filter** as necessary, and click ⟳ to refresh the report.

3. Click **Paychex Export**. The system saves the export in the downloads folder of your computer.

TIPS REPORT

The Tips report provides a report of the total amount of credit card tips declared per employee, per business day. You can use this report to identify which employees are receiving the highest and lowest tips. By default, the report includes all employees; however, you can filter the report to display only a specific employee.

1. On the Reports menu, select **Tips**. The system generates a report for all employees.

2. Click ⌄ to display a drop-down list of employees by which you can filter the report.

3. Click ↻ in the Report Preview toolbar to refresh the data. The report appears in the Report Preview screen.
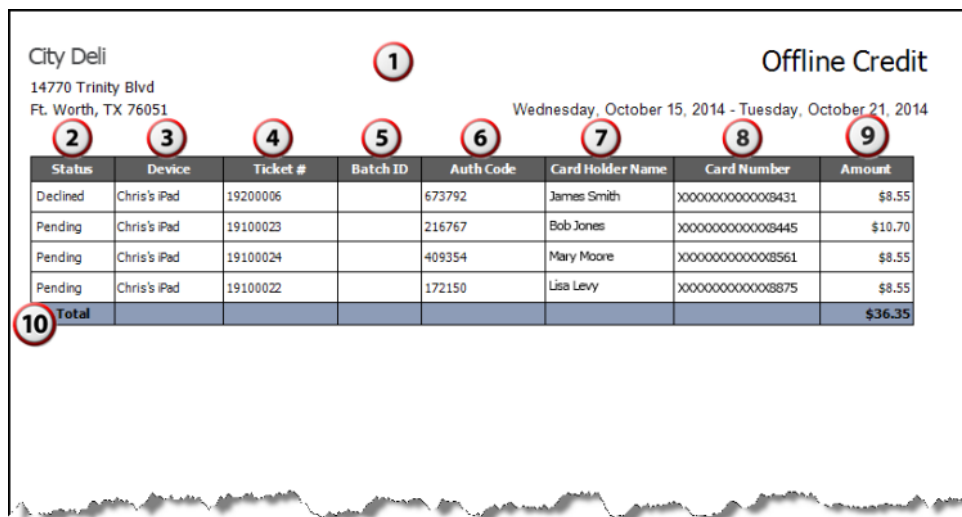
#	Column	Description
1	Header	Header includes: • The name and address of the store. • The selected time period for the report. • The name of the report.
2	Employee Name	The name of the employee
3	Date	The business date for which the employee earned tips.
4	Sales (Pre-Tax)	The total amount of sales prior to applying sales tax.
5	Gratuity	The total amount of gratuities applied to guest checks for the employee.
6	Electronic Tips	The total amount of credit card tips applied to guest checks for the employee.
7	% of Sales	The percentage of tips earned. The system calculates the percentage as pre-tax sales divided by electronic tips.
8	Total	The total for each column.

OFFLINE CREDIT REPORT

The Offline Credit report provides a list of the offline credit card transactions and their batch settlement status. For each offline credit transaction, the report includes detailed information such as the device on which the transaction occurred, the ticket number, the batch ID, the authorization code, cardholder name, credit card number, and the amount of the transaction. Use this report to track the status of your offline credit card transactions, and determine if they are 'Approved,' 'Pending,' or 'Declined.' You can filter the report to display transaction from a specific device, or to display transactions with a specific authorization status.

1. On the Reports menu, select **Offline Credit**. The system generates a report for all devices and all statuses.

2. Click ☑ to display a drop-down list of devices by which you can filter the report.

3. Click ☑ to display a drop-down list of statuses by which you can filter the report.

4. Click ☉ in the Report Preview toolbar to refresh the data. The report appears in the Report Preview screen

#	Column	Description
1	Header	Header includes: • The name and address of the store. • The selected time period for the report. • The name of the report.
2	Status	The status of the offline credit transaction. The possible statuses include 'Approved,' 'Pending,' and 'Declined.'
3	Device	The name of the device on which the offline credit transaction occurred.
4	Ticket #	The ticket number of the transaction.
5	Batch ID	The batch ID number of the offline credit transaction. If you have not submitted the transaction for credit settlement processing, no number appears.
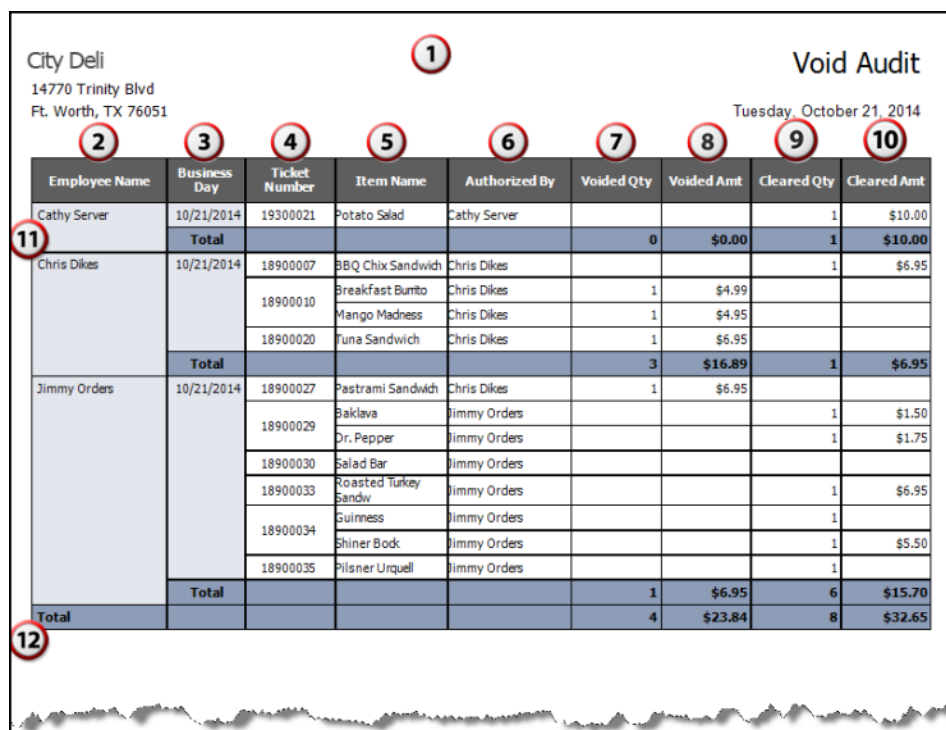
6	Auth Code	The authorization code for the offline credit transaction.
7	CardHolder Name	The name of the credit card holder.
8	Card Number	The credit card number of the offline transaction. The system only displays the last four numbers of the credit card.
9	Amount	The amount of the offline credit card transaction.
10	Totals	The total amount of offline credit card transactions.

VOID AUDIT REPORT

The Void Audit report allows you to track the number of clears and voids entered by your employees. NCR Silver Pro Restaurant distinguishes between clears and voids based on the state of the order when you delete the item or guest check. Deleting an item or guest check before finalization results in a clear. Deleting an item or guest check after finalization results in a void. Finalization occurs when you submit the items for order to the kitchen, tap PAY, tap SEND (table service only), tap SAVE (quick service only), back out of the order, log out of the POS app, or press the home button on the iPad.

Use this report to identify trends among employees in deleting items from tickets or to identify menu items employees regularly clear or void. The report also includes the name of the employee who approved the clear or void.

City Deli
14770 Trinity Blvd
Ft. Worth, TX 76051

Void Audit

Tuesday, October 21, 2014

Employee Name	Business Day	Ticket Number	Item Name	Authorized By	Voided Qty	Voided Amt	Cleared Qty	Cleared Amt
Cathy Server	10/21/2014	19300021	Potato Salad	Cathy Server			1	$10.00
	Total				0	$0.00	1	$10.00
Chris Dikes	10/21/2014	18900007	BBQ Chix Sandwich	Chris Dikes			1	$6.95
		18900010	Breakfast Burrito	Chris Dikes	1	$4.99		
			Mango Madness	Chris Dikes	1	$4.95		
		18900020	Tuna Sandwich	Chris Dikes	1	$6.95		
	Total				3	$16.89	1	$6.95
Jimmy Orders	10/21/2014	18900027	Pastrami Sandwich	Chris Dikes	1	$6.95		
		18900029	Baklava	Jimmy Orders			1	$1.50
			Dr. Pepper	Jimmy Orders			1	$1.75
		18900030	Salad Bar	Jimmy Orders				
		18900033	Roasted Turkey Sandw	Jimmy Orders			1	$6.95
		18900034	Guinness	Jimmy Orders			1	
			Shiner Bock	Jimmy Orders			1	$5.50
		18900035	Pilsner Urquell	Jimmy Orders			1	
	Total				1	$6.95	6	$15.70
Total					4	$23.84	8	$32.65

#	Column	Description
1	Header	Header includes: • The name and address of the store. • The selected time period for the report. • The name of the report.
2	Employee Name	The name of the employee.
3	Business Day	The business date on which the void or clear occurred.
4	Ticket Number	The ticket number of the transaction.

5	Item Name	The name of the menu item.
6	Authorized By	The name of the employee who approved the clear or void.
7	Voided Qty	The quantify of the item voided.
8	Voided Amt	The amount of the item voided. The system multiplies the quantity of the item voided by the sales price.
9	Cleared Qty	The quantity of the item cleared.
10	Cleared Amt	The amount of the item cleared. The system multiplies the quantity of the item cleared by the sales price.
11	Total (By Employee)	The total number and amount of voids and clears for the employee.
12	Total	The total number and amount of voids and clears for the store.

DEPARTMENT SALES REPORT

The Department Sales report enables you to track the sales activity for each department in your restaurant, such as 'Food,' 'Beverages,' and 'Alcohol.' If you want to evaluate the individual categories on your menu, such as 'Sandwiches' and 'Soups,' you can filter the report to display the categories belonging to each department.

1. On the Reports menu, select **Department Sales**. The system generates the report. Category data remains hidden.

2. Click **Show Categories** to display the categories associated with each department.

3. Click 🔄 in the Report Preview toolbar to refresh the data. The report appears in the Report Preview screen.

City Deli
14770 Trinity Blvd
Ft. Worth, TX 76051

Department Sales
Wednesday, October 01, 2014 - Wednesday, December 31, 2014

Department	Gross Sales	Gross Refunds (-)	Discounts (-)	Inclusive Taxes (-)	Net Sales (=)	Exclusive Taxes	% of net sales
BEER	$900.00	$0.00	$0.00	$90.00	$810.00	$0.00	12.07 %
BEVERAGE	$1,950.00	$10.00	$70.00	$0.00	$1,870.00	$154.28	27.87 %
FOOD	$4,000.00	$60.00	$110.00	$0.00	$3,830.00	$315.98	57.08 %
RETAIL	$200.00	$0.00	$0.00	$0.00	$200.00	$0.00	2.98 %
Total	**$7,050.00**	**$70.00**	**$180.00**	**$90.00**	**$6,710.00**	**$470.25**	**100.00 %**

City Deli
14770 Trinity Blvd
Ft. Worth, TX 76051

Department Sales
Wednesday, October 01, 2014 - Wednesday, December 31, 2014

Department	Category	Gross Sales	Gross Refunds (-)	Discounts (-)	Inclusive Taxes (-)	Net Sales (=)	Exclusive Taxes	% of net sales
BEER	BEER	$900.00	$0.00	$0.00	$90.00	$810.00	$0.00	12.07 %
	Total	**$900.00**	**$0.00**	**$0.00**	**$90.00**	**$810.00**	**$0.00**	**12.07 %**
BEVERAGE	SMOOTHIES	$400.00	$0.00	$20.00	$0.00	$380.00	$31.35	5.66 %
	ICE COFFEE	$450.00	$0.00	$15.00	$0.00	$435.00	$35.89	6.48 %
	COFFEE	$600.00	$10.00	$15.00	$0.00	$575.00	$47.44	8.57 %
	DRINKS	$500.00	$0.00	$20.00	$0.00	$480.00	$39.60	7.15 %
	Total	**$1,950.00**	**$10.00**	**$70.00**	**$0.00**	**$1,870.00**	**$154.28**	**27.87 %**
FOOD	SOUPS	$700.00	$10.00	$20.00	$0.00	$670.00	$55.28	9.99 %
	BREAKFAST	$500.00	$10.00	$25.00	$0.00	$465.00	$38.36	6.93 %
	HOT SANDW	$900.00	$15.00	$20.00	$0.00	$865.00	$71.36	12.89 %
	COLD SANDW	$900.00	$15.00	$25.00	$0.00	$860.00	$70.95	12.82 %
	PASTRIES	$400.00	$0.00	$0.00	$0.00	$400.00	$33.00	5.96 %
	SALADS	$600.00	$10.00	$20.00	$0.00	$570.00	$47.03	8.49 %
	Total	**$4,000.00**	**$60.00**	**$110.00**	**$0.00**	**$3,830.00**	**$315.98**	**57.08 %**
RETAIL	GIFT CARD	$200.00	$0.00	$0.00	$0.00	$200.00	$0.00	2.98 %
	Total	**$200.00**	**$0.00**	**$0.00**	**$0.00**	**$200.00**	**$0.00**	**2.98 %**
Total		**$7,050.00**	**$70.00**	**$180.00**	**$90.00**	**$6,710.00**	**$470.25**	**100.00 %**

#	Column	Description
1	Header	Header includes: • The name and address of the store. • The selected time period for the report.

		• The name of the report.
2	Department	The name of the department.
3	Category	The name of the category. You must select Show Categories to display category information.
4	Gross Sales	The total amount of gross sales.
5	Gross Refunds (-)	The total amount of refunds.
6	Discounts (-)	The total amount of discounts for the department.
7	Inclusive Taxes (-)	The total amount of inclusive taxes.
8	Net Sales (=)	The total amount of net sales.
9	Exclusive Taxes	The total amount of exclusive taxes.
10	% of net sales	The percentage of net sales. The system calculates the percentage as net sales for the department divided by the total amount of net sales.
11	Total	The total for each column.

ITEM SALES REPORT

The Item Sales report enables you to track the sales activity for each of the items in your restaurant. Use this report to determine how specific items sell within a specified time period. By default, the report includes all items in your menu. You can filter the item report by a specific category and hide variations and modifiers.

1. On the Reports menu, select **Item Sales**. The system generates a report for All Items.

2. Click ⌄ to display a drop-down list of categories by which you can filter the report.

3. Click **Hide Variation**s to not display the variations associated with each item.

4. Click ⟳ in the Report Preview toolbar to refresh the data. The report appears in the Report Preview screen.

CD's Cafe

14770 Trinity Blvd
Fort Worth, TX 76155

Item Sales

Wednesday, January 13, 2016 - Thursday, February 11, 2016

Category	Item Name	Variations	Current Price	Net Sales			
				Avg. Price	Sold Qty.	Weight Qty.	Amt.
BEER	Bud Light		$15.00	$10.48	21.00		$220.15
	Dos Equis		$6.00	$5.23	3.00		$15.70
	Guinness		$6.00	$5.38	2.00		$10.76
	Heineken		$6.00	$4.81	2.00		$9.62
	Mimosa		$9.00	$7.24	1.00		$7.24
	Shiner Bock		$12.00	$11.09	2.00		$22.17
	Stella		$5.00	$4.62	1.00		$4.62
	Total				**32.00**		**$290.26**
BURGERS	Double		$7.00	$7.00	1.00		$7.00
	Medium		$0.00	$0.00	2.00		$0.00
	Single		$5.00	$5.00	1.00		$5.00
	Triple		$8.00	$8.00	1.00		$8.00
	Well Done		$0.00	$0.00	1.00		$0.00
	Total				**6.00**		**$20.00**
COFFEE	No Foam		$0.00	$0.00	21.00		$0.00
	Total				**21.00**		**$0.00**
DESSERTS	Brownie		$2.50	$1.76	9.00		$15.87
	Cheesecake		$4.50	$3.62	17.00		$61.50
	Choc Chip Ckie		$2.50	$2.50	4.00		$10.00
	Ice Cream		$3.75	$2.79	3.00		$8.38
	Milkshake	Small Vanilla	$2.50	$1.00	3.00		$3.00
	Sundae	Strawberries	$4.50	$3.50	1.00		$3.50
	Test Smoothie		$0.50	$0.50	1.00	24.40/oz	$12.20
	Yogurt		$0.40	$0.39	5.00	51.48/oz	$20.30

Column	Description
Header	Header includes: • The name and address of the store. • The selected time period for the report. • The name of the report.

Category	The name of the menu category.
Item Name	The name of the menu or modifier item.
Variations	The name of the variation.
Current Price	The current price of the menu item.
Net Sales	The Net Sales section includes: • The average price of the menu item sold. If you discounted the price of an item, or a ticket with the menu item, the average price may be lower than the current price. • The total number of items sold. • The total weighed quantity sold, if the item is sold by weight. • The total amount of sales of the item.
Total	The total number of items sold and the total amount of sales for the menu category.

66

MODIFIER SALES REPORT

The Modifier Sales report enables you to track the sales activity for each modifier for a selected time period, according to modifier group. Use this report to determine how specific modifier items sell within a specified time period. This report shows all modifiers sold, whether the modifier contains a price or not. By default, the Modifier Sales includes all modifier groups; however, you can filter the report to display only a specific modifier group. You can also elect to hide variations.

1. On the Reports menu, select **Modifier Sales**. The system generates a report for All Modifiers.

2. Click ☑ to display a drop-down list of modifier groups by which you can filter the report.

3. Click ↻ in the Report Preview toolbar to refresh the data. The report appears in the Report Preview screen.

#	Column	Description
1	Header	Header includes: • The name and address of the store. • The selected time period for the report. • The name of the report.
2	Modifier Group	The name of the modifier group.
3	Modifier Item	The name of the modifier item.
4	Variations	The name of the variation.
5	Current Price	The price of the modifier item.

6	Net Sales	The Net Sales section includes:
		• The average price of the modifier item. If you discounted the price of an item, or a ticket with the item included, the average price may be lower than the current price. • The total number of items sold. • The total amount of sales for the item.
7	Total	The total number of items sold and the total amount of sales for modifier items.

SALES SUMMARY REPORT

Sales Summary provides you with an overview of your sales for a selected time period and enables you to look for sales trends. By default, the Sales Summary report provides an overview of the last thirty days. Click one of the business days to generate a Store Summary report for that particular business day.

#	Column	Description
1	Header	Header includes: • The name and address of the store. • The selected time period for the report. • The name of the report.
2	Business Day	The business date for the sales activity.
3	Transaction Quantity	The total number of transactions entered.
4	Guest Count	The total number of guests, according to the ticket seat.
5	Tax Amount	The total amount of sales tax collected.
6	Refunded Qty.	The total number of refunds.
7	Refunded Amt.	The total amount of refunds.

8	Item Sales Qty.	The total number of items sold.
9	Net Sales Amt.	The total amount of net sales.
10	Total	The totals for each column.
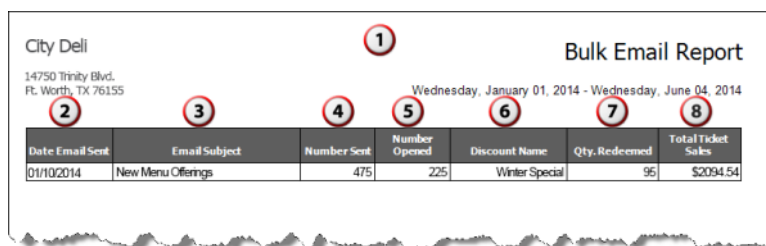
HOURLY SALES REPORT

Hourly Sales provides you with a breakdown of your sales by hour and enables you to look for sales trends. You can also filter the report by specific days of the week.

Column	Description
Header	Header includes: • The name and address of the store. • The selected time period for the report. • The name of the report.
Hour (start)	The beginning hour for the sales calculations.
Transaction Qty.	The number of transactions for the hour.
Guest Count	The total number of guests for the hour.
Tax Amount	The total collected tax for the hour.
Refunded Qty	The total number of refund transactions for the hour.
Refunded Amt.	The total amount refunded for the hour.
Items Sales Qty.	The total amount of items sold during the hour.
Item Sales Amount	The total sales for the hour.

71

BULK EMAIL REPORT

The Bulk Email report provides an analysis to assist you in evaluating the success of your bulk email campaign over a selected time period. The report provides information such as the total number of customers to which you sent a marketing email message, the number of customers who opened your email message, the number of offers redeemed from the offer in your marketing email message, and the total dollar amount of sales generated by your email campaign.
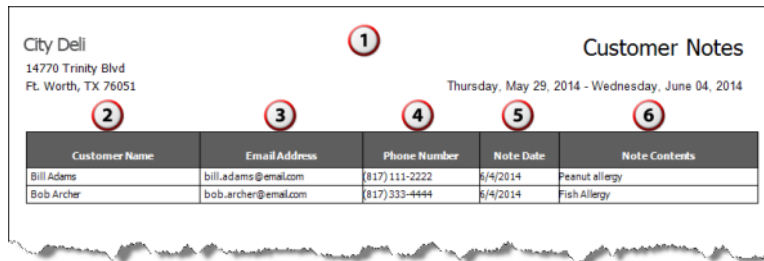
#	Column	Description
1	Header	Header includes: • The name and address of the store. • The selected time period for the report. • The name of the report.
2	Date Email Sent	The date you sent the email message.
3	Email Subject	The subject of the email.
4	Number Sent	The total number of email messages sent to your customers.
5	Number Opened	The total number of email messages opened by your customers.
6	Discount Name	The name of the discount offer included in the email message.
7	Qty. Redeemed	The total number of discounts redeemed.
8	Total Ticket Sales	The total amount of sales generated by your email marketing message.

CUSTOMER NOTES REPORT

The Customer Notes reports displays all the notes entered about your customers within a selected time period, such as hobbies, birthdays, delivery information, food allergies, or other information. You can also filter the report to search for specific keywords.

1. On the Reports menu, select **Customer Notes**. The system generates a report with all notes.

2. In the Report Preview toolbar, type a **keyword** by which to filter your search results.

3. Click ⟳ in the Report Preview toolbar to refresh the data. The report appears in the Report Preview screen.

#	Column	Description
1	Header	Header includes: • The name and address of the store. • The selected time period for the report. • The name of the report.
2	Customer Name	The name of the customer.
3	Email Address	The email address of the customer.
4	Phone Number	The phone number of the customer.
5	Note Date	The date an employee entered the note into the system.
6	Note Contents	The customer note.

CUSTOMER SALES REPORT

The Customer Sales report provides a sales summary for each customer within the selected time period. You can view the last purchase date and amount, the total dollars spent by the customer, and the average amount spent per visit by the customer.

#	Column	Description
1	Header	Header includes: • The name and address of the store. • The selected time period for the report. • The name of the report.
2	Customer Name	The name of the customer.
3	Customer Category	The category assigned to the customer, if any.
4	Email Address	The email address of the customer.
5	Last Purchase Date	The last date of purchase by the customer.
6	Total Number of Visits	The total number of visits by the customer within the selected time period.
7	Last Purchase Amount	The last ticket total for the customer, including sales tax.
8	Total $ Spent	The total amount spent by the customer at your restaurant within the selected time period, excluding sales tax.

9	Average $ Spent	The average amount of each ticket by the customer. The system calculates the average as total spent divided by the total number of visits.

75

HOUSE ACCOUNTS

The House Accounts report enables you to see a list of your house accounts, their maximum balance, and their last statement date. You can view a list of all house accounts or filter the report to view a specific house account.

1. On the Reports menu, select **House Accounts**. The system generates a report with all house accounts.

2. In the Report Preview toolbar, select a **house account** by which to filter your search results.

3. Click ⟳ in the Report Preview toolbar to refresh the data. The report appears in the Report Preview screen.

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

House Accounts

Monday, February 01, 2016 - Monday, April 18, 2016

Number	Name	Enabled	Maximum Balance	Address	Phone #	Email	Last Statement
	NCR	YES	$500.00	14770 Trinity Blvd Fort Worth TX 76155	817-123-4567	george.smith@email.com	4/14/2016
1	SMB	YES	$100.00	123 Main St Fort Worth TX 76150	817-444-5555	test@email.com	

Column	Description
Header	Header includes: • The name and address of the store. • The name of the report. • The date range for the report
Number	The external ID associated with the house account.
Name	The name of the house account.
Enabled	Identifies if the house account is enabled or not.
Maximum Balance	The maximum balance for the house account.
Address	The address for the house account.
Phone Number	The phone number for the house account..

Email	The email address for the house account.
Last Statement	The last date for which a statement was issued.

HOUSE ACCOUNTS ACTIVITY

The House Accounts Activity report enables you to see a list of all activity related to house accounts, including purchases, credits, debits, payments, and statements created. You can view the device on which the transaction occurred as well as the user or ticket number and the date and time of the transaction. You can view a list of all house accounts or filter the report to view a specific house account.

1. On the Reports menu, select **House Accounts**. The system generates a report with all house accounts.

2. In the Report Preview toolbar, select a **house account** by which to filter your search results.

3. Click ⟳ in the Report Preview toolbar to refresh the data. The report appears in the Report Preview screen.

CD's Cafe

14770 Trinity Blvd
Fort Worth, TX 76155

Monday, February 01, 2016 - Monday, April 18, 2016

Number	Name	Device	User/Ticket#	Date/Time	Transaction/Note	Amount
	NCR	Silver Pro Lab 1	10400255	4/11/2016 4:46 PM	Sale	$16.24
		Silver Pro Lab 1	10400256	4/11/2016 4:47 PM	Sale	$33.56
				4/11/2016 5:47 PM	Payment Received	$10.00
				4/11/2016 5:49 PM	Statement Requested (#10001-00004)	
		Silver Pro Lab 1	10400260	4/11/2016 4:55 PM	Sale	$18.40
		Silver Pro Lab 1	10400262	4/11/2016 4:55 PM	Sale	$18.40
				4/14/2016 9:35 AM	Statement Requested (#10001-00007)	
						$96.60
Total						**$96.60**

Column	Description
Header	Header includes: • The name and address of the store. • The name of the report. • The date range for the report
Number	The external ID for the house account.
Name	The name of the house account.
Device	The device where the transaction occurred.
User/Ticket#	The user or ticket number for the house account transaction.
Date/Time	The date and time of the transaction.

Transaction/Note	The transaction type and/or any note associated with the transaction.
Amount	The amount of the transaction.

ITEMS REPORT

The Items report displays all of the items on your menu according to category. The report defaults to 'All' items; however, you can filter the report to display specific categories. You can also filter the report to include the variations for a menu item.

1. On the Reports menu, select **Items**. The system generates a report for All Items.

2. Click ⬇ to display a drop-down list of categories by which you can filter the report.

3. Click ⟳ in the Report Preview toolbar to refresh the data. The report appears in the Report Preview screen.

#	Column	Description
1	Header	Header includes: • The name and address of the store. • The name of the report.
2	Category	The name of the category.
3	Item Name	The name of the item.
4	Description	The description of the item.
5	Menu Item	Identifies if the item is a menu item.
6	Modifier	Identifies if the item is a modifier item.

7	Barcode	Identifies the barcode associated with the item.
8	Prompt For Price	Identifies if the system is to prompt employees to enter a price for the item.
9	Price	The price of the item.
10	Sold by Weight/Measure	Identifies if you sell the item by weight/measure.
11	Tax Category	The tax category for the item.
12	Available for Sale on POS	Identifies if the item is actively available for sale in your restaurant.
13	Printer Group	The name of the printer group assigned to the item.

CUSTOMERS REPORT

The Customers report enables you to see a list of all of your customers. Use the report to evaluate the success of your employees in collecting customer information, the first purchase of a customer, and the most recent purchase of a customer.

#	Column	Description
1	Header	Header includes: • The name and address of the store. • The name of the report.
2	Customer Name	The name of the customer.
3	Address	The address of the customer.
4	City	The city of the customer.
5	State	The state of the customer.
6	Zip Code	The ZIP code of the customer.
7	Phone #	The phone number of the customer.
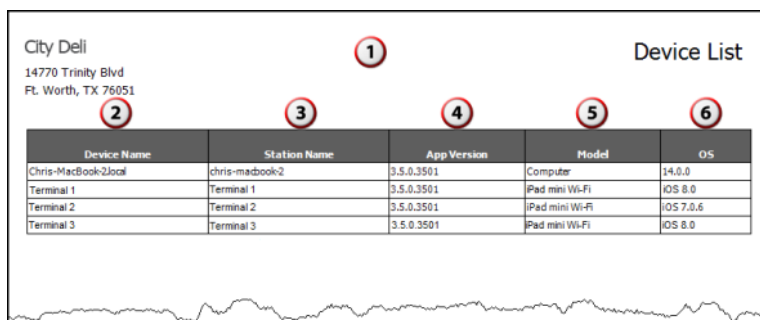
8	Email address	The email address of the customer.
9	First purchase	The date of the first purchase by the customer.
10	Last Purchase	The date of the most recent purchase by the customer.

DEVICES REPORT

The Devices report enables you to gather a list of all devices associated with your restaurant. Use this report to identify the version of Silver Pro Restaurant on your devices and the operating system running each device.

#	Column	Description
1	Header	Header includes: • The name and address of the store. • The name of the report.
2	Device Name	The name of the device.
3	Station Name	The name of the station.
4	App Version	The app version of the device.
5	Model	The model of the device.
6	OS	The operating system of the device.
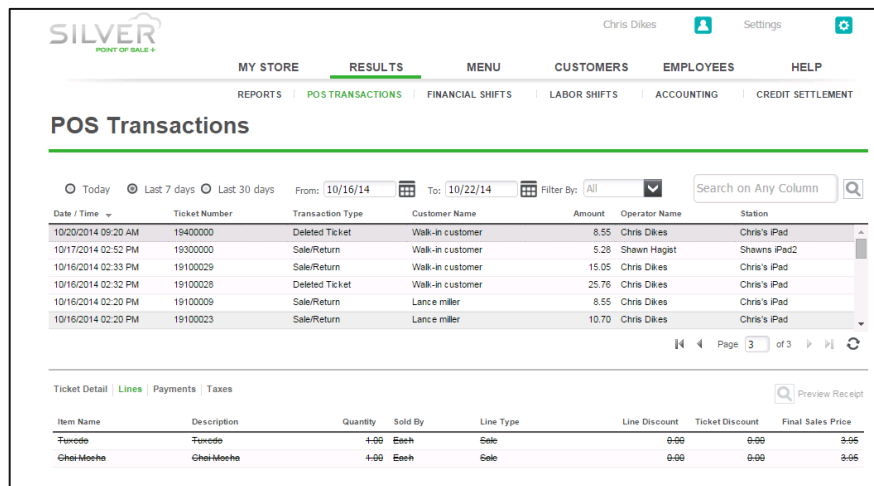
POS TRANSACTIONS

VIEWING POS TRANSACTIONS

Use POS Transactions to view details on specific transactions, such as deleted guest checks, and items and payments deleted from a guest check. For weighed items that have been manually entered, a '(M)' appears behind the weight.

In Silver Back Office, select **RESULTS > POS Transactions**.

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

To review deleted items in a guest check:

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

2. Select the **guest check**.

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

To review a deleted payment in a guest check:

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

2. Select the **guest check**.

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

To send an email copy of the receipt to a customer.

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

2. Select the **guest check**.

3. Click **Preview Receipt**. A copy of the customer receipt appears.

4. Type the **customer email address**.

5. Click **Send**.

EXPORTING POS TRANSACTIONS

You can also export POS Transactions into a .csv file. When you click Export Transactions, two download files are created: Ticket Detail.csv and POS Trans.csv.

POS Trans.csv contains details such as Date/Time, Ticket Number, Transaction Type, Customer Name, Customer Number, Operator Name, Station, Selling Location, Gross Subtotal, Discounts/Promos, Tax, Tip, Total, Tendered, Change, and Method of Payment (MOP).
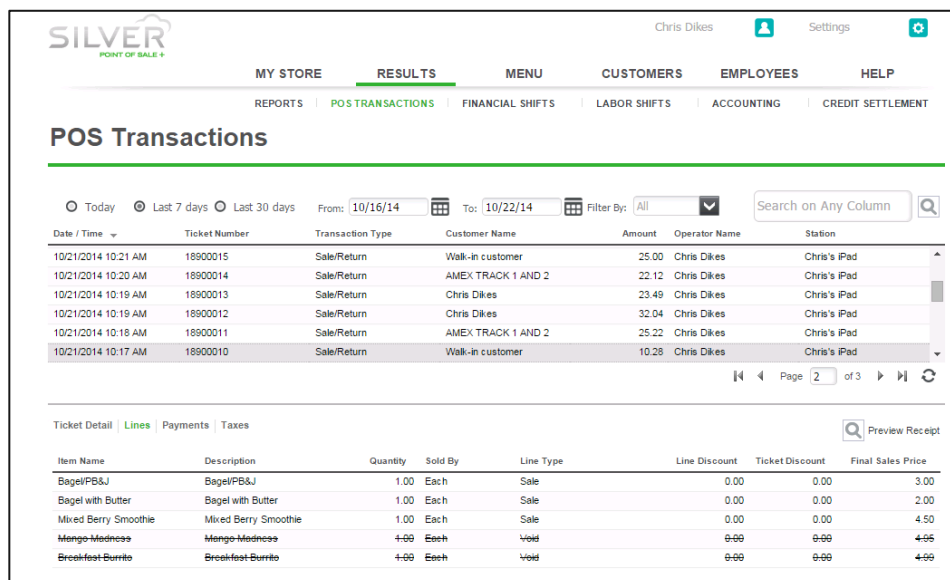
Ticket Detail.csv contains details such as Date/Time, Ticket Number, Item Name, Description, Quantity, Sold by, Line Type, Line Discount, Ticket Discount, and Final Sales Price.

To export POS Transactions:

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

2. Click **Export Transactions**. POS Trans.csv and Ticket Detail.csv download to your computer.

LABOR SHIFTS
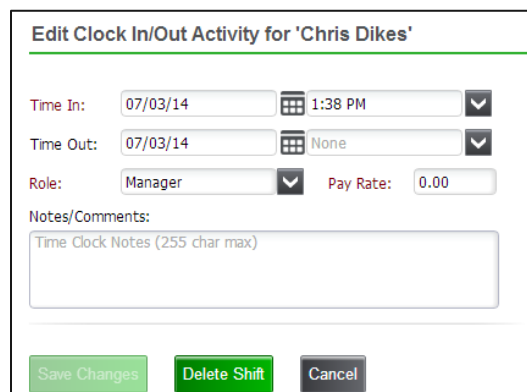
The LABOR SHIFTS page allows you to view and edit employee punches. Additionally, you can view any edits that have been made to labor shifts.

EDITING EMPLOYEE LABOR SHIFTS

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

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

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

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

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

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

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

6. Click **Save Changes**.

VIEWING LABOR SHIFT EDITS
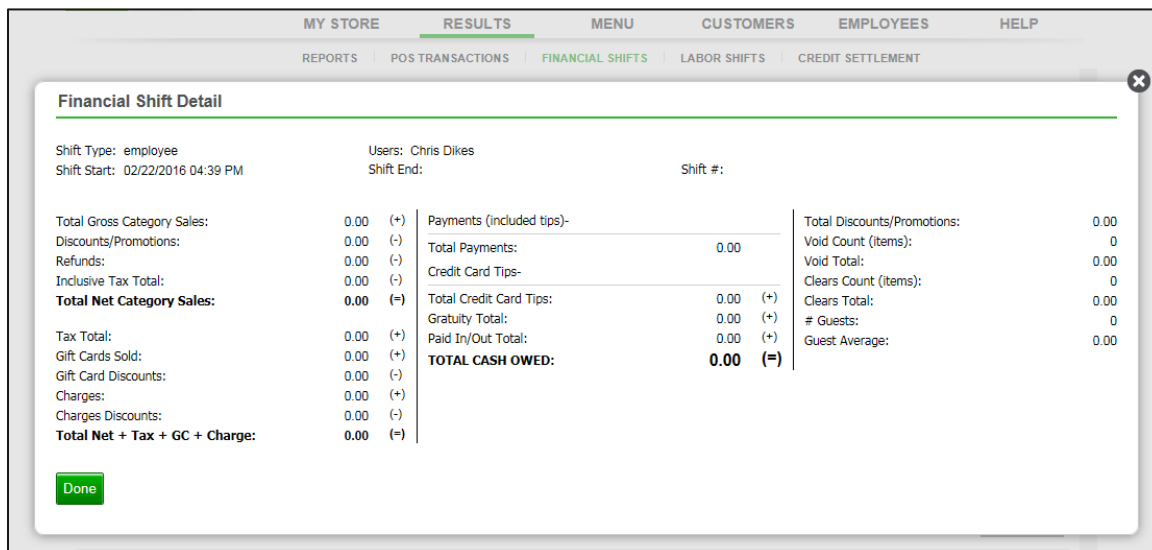
You can also view edits made to labor shifts.

1. Select **RESULTS > Labor Shifts**.

2. Click the **employee** for whom you want to view any edits to their labor shift. The Edit Clock In/Out Activity dialog appears.

3. Click **Audit Log**. The Labor Shift Audit screen appears. The first line indicates the original punch and each each subsequent line indicates the edit made and who made the edit.

4. Click **Done** to close the dialog. The Edit Clock In/Out dialog appears.

5. Click **Cancel** to return to the Labor Shifts page.

FINANCIAL SHIFTS

The FINANCIAL SHIFTS page enables you to view the TOTAL CASH OWED for a financial shift and to receive cash. Clicking on a financial shift will display a snapshot of the shift details.

 Note: if being used, cash rounding will show.

Note: You will also see the **Declared Cash Amount** under **TOTAL CASH OWED** if you are utilizing drawer shifts along with the total starting and ending cash amounts, if being used.

RECEIVING CASH FROM THE EMPLOYEE AT THE SHIFT END

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

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

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

3. Click **Receive Cash** for the employee and the date for which you are receiving cash. A 'Cash for Employee Name on Shift X' prompt appears.

4. Type the **amount received**. The system defaults to the expected amount to receive, which is the amount from the TOTAL CASH OWED line of the Shift End Report.

5. Click **Receive Cash**. The system returns to the Financial Shifts screen and adds the amount to the 'Cash/Check
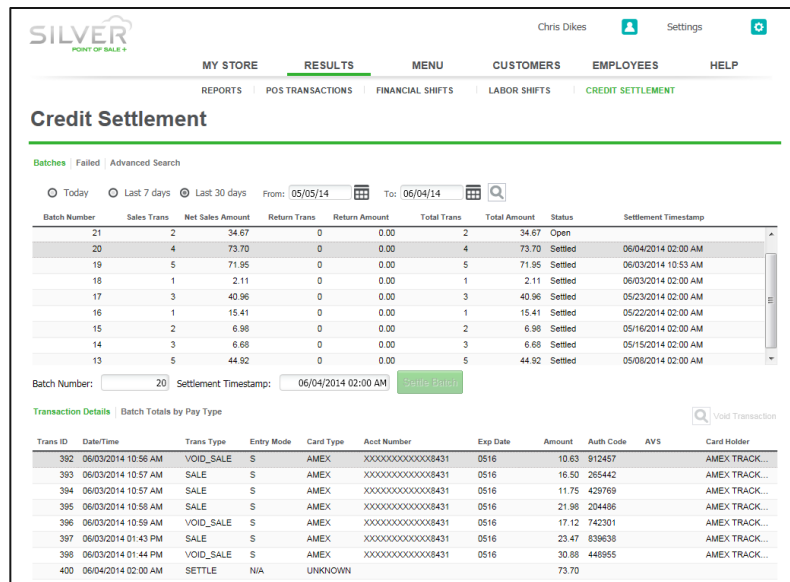
CREDIT SETTLEMENT

View the results of your credit settlement to monitor and track the batch processing of your credit card transactions. You can also export your credit settlement transactions.

VIEWING CREDIT SETTLEMENT

Log in to Silver Back Office through a Web browser, and select **RESULTS > CREDIT SETTLEMENT**. Filter your results by 'Today,' 'Last 7 days,' 'Last 30 days,' or use the calendar to select a start and end date. Click to initiate a search.

When you select a batch, the associated credit card transactions appear under Transaction Details. The status of a batch can be:

> **Open** — Not yet submitted for processing.

> **Settled** — Successfully submitted. Settled batches contain a timestamp with the date and time of when the processing completed.

> **Failed** — Batch failed due to an error with one or more transactions.

EXPORTING CREDIT SETTLEMENT

You can export a batch of your credit settlement. When you click Export, Silver Back Office downloads two files, Credit Batch Detail.csv and Credit Batch Summary.csv to the downloads folder of your computer.

Credit Batch Detail.csv includes the Batch Number, Trans ID, Date/Time, Trans Type, Card Type, Account Number, Exp Date, Amount, Auth Code, AVS, Card Holder, and Ticket Number.

Credit Batch Summary.csv includes Batch Number, Sales Trans, Net Sales Amount, Return Trans, Total Trans, Total Amount, Status, and Settlement Timestamp.
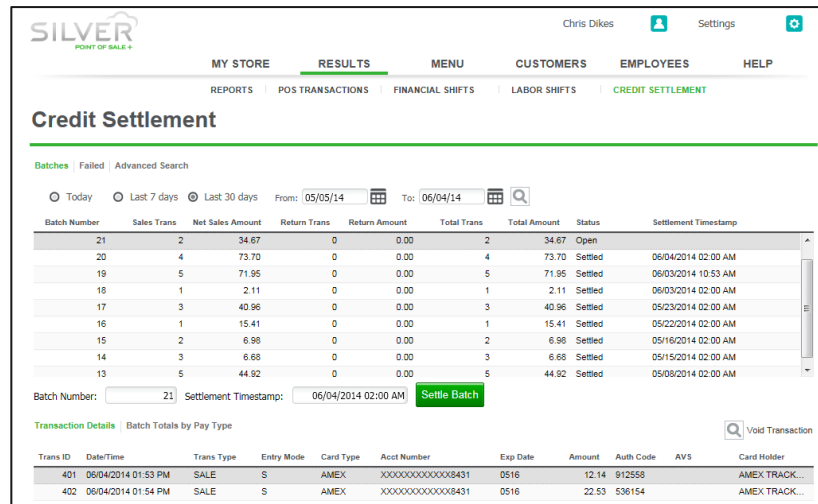
1. Select **RESULTS > Credit Settlement**.

2. Click **Export**. The files download to your computer.

PROCESSING A BATCH MANUALLY

You can also settle a batch of credit card transactions manually.

1. In Silver Back Office, select **RESULTS > CREDIT SETTLEMENT**.

2. Select the **batch** to manually submit for processing.

3. Click **Settle Batch**. A confirm batch settlement prompt appears.

4. Click **OK**. The system processes the batch, and a success prompt appears.

5. Click **OK**. At the Credit Settlement screen, the status for the batch changes to 'Settled.'
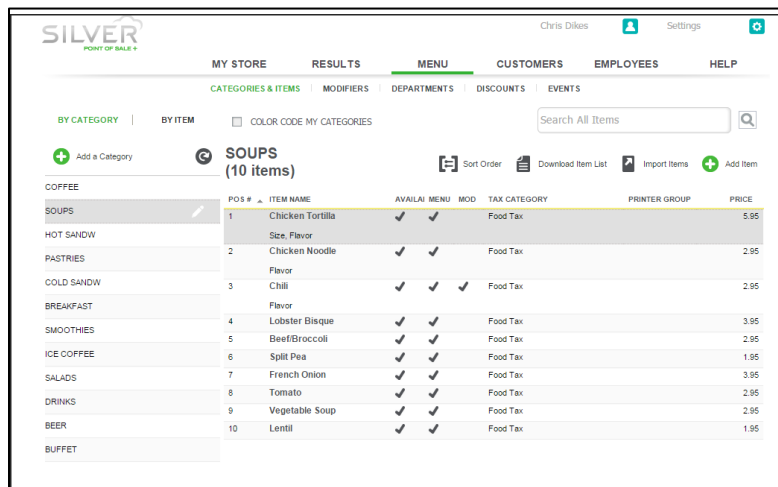
MENU

When you set up your menu, you define the items for sale in your restaurant and the manner in which they appear on the POS app. Categories allow you to organize your items for quick navigation on the POS app. You can add modifiers for your menu items and create discounts, promotions, and special pricing events. Departments allow you to organize your categories for reporting purposes. Tags enable you to group items for promotions. Price Lists enable you to manage pricing for your items.

You can create your menu in the Silver Back Office, or you can import a .csv file using the menu template. Prior to importing a template, you must create your tax categories.

CATEGORIES

Create categories in which to group your items. For example, Salads, Soups, Sandwiches, Desserts, and Drinks. You can also manage your favorites category so that it is easy to access frequently sold items in the back office and on the POS.

1. Select **MENU > CATEGORIES & ITEMS**.

2. Select **Add a Category**.

3. Type a **name** for the category. The maximum number of characters is ten. The category name appears on the POS app at the order entry screen.

4. (Optional) Select the **department** for the category from the drop-down list.

5. (Optional) Click **Tag** to assign a tag to the category.

6. Click **Save**.
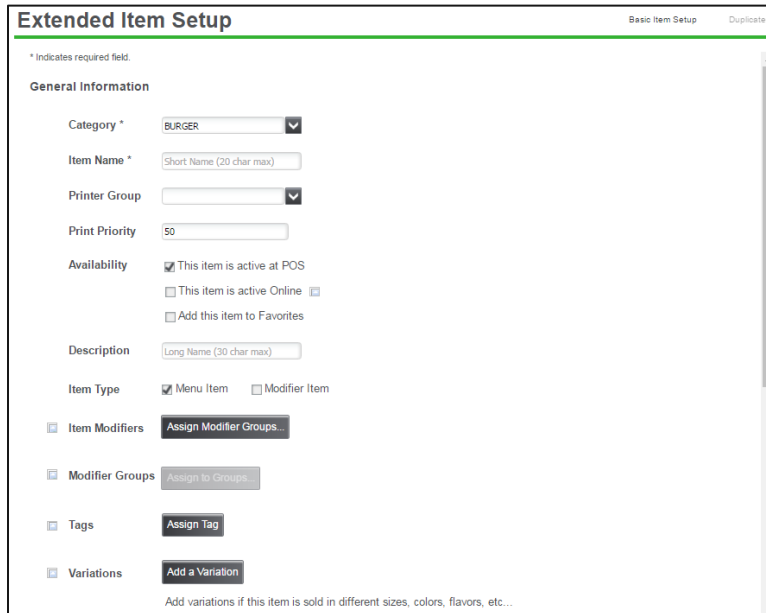
MENU ITEMS

Create an item for each item you offer on your menu and for each item you offer as a modifier. Use modifier groups to organize your modifier items. Once an item is created, it can be edited in the item details page or through the **Edit Multiple Items** function.

CREATING ITEMS

You can create items for use in your restaurant.
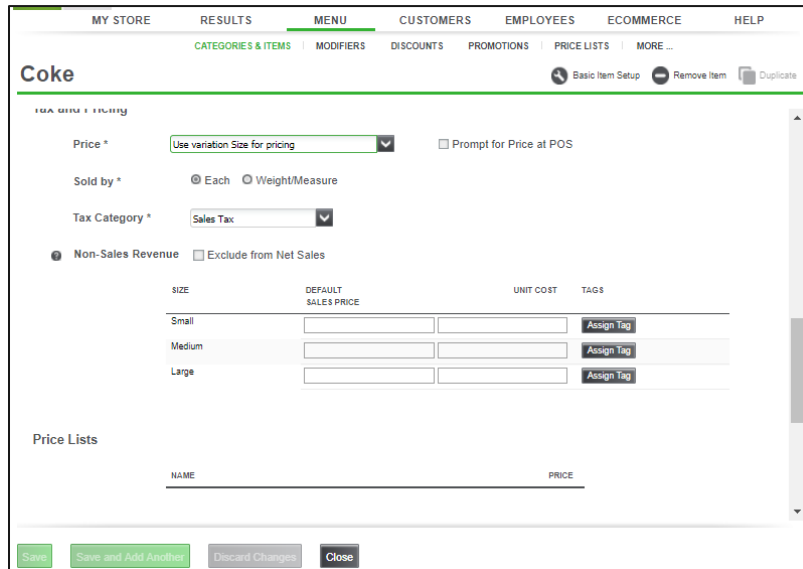
1. Select **MENU > CATEGORIES & ITEMS**.

2. Select **Add Item**.

3. Select a **category** from the drop-down list.

4. Type a **name** for the item. The maximum number of characters is twenty. The item name is what you see on the POS app at the order entry screen.

5. Select a **printer group** from the drop-down list.

6. Assign a **print priority number** to the item. Print priority enables the system to sort items and modifiers on the kitchen chit based on their print priority rather than the order in which you enter them.

   - '1' is the highest priority and '100' is the lowest priority.

   - If two items contain the same print priority, they appear on the kitchen chit in the order entered on the POS.

   - The system sorts modifiers under the associated parent item.

   - In Table Service, the system sorts items on the kitchen chit first by seat and then by print priority.

7. Select **This item is available at POS** to activate the item for the menu.

8. (Optional) Click **Add this Item to Favorites** to include in the favorites category.

9. (Multi-Store only) Click **Assign Stores** to assign the item to specific stores.

10. (Optional) Type a **description** for the item.

11. Select whether the item is a **menu item**, **modifier item**, or **both**.

    - Selecting 'Menu Item' gives you the option to assign modifier groups to the item. Click **Assign Modifier Groups**, choose the **appropriate groups**, and click **Done**.

    - Selecting 'Modifier Item' gives you the option to assign the item to one or more modifier groups. Click **Assign to Group**, make the **appropriate selections**, and click **Done**.

12. (Optional) Click **Tag** to assign a tag to the item.

13. Select **variations**, such as size, color, or flavor. Each item can have up to three variations.

14. (Optional) Type the **bar code** number.

15. (Optional) Assign an **External ID number** to the item. It is not necessary to enter an External ID number.

    - If you leave External ID blank, the system populates the External ID with a system-assigned Master Item ID when you save the item record.

    - If you enter a number for the External ID, the External ID number for the item will be different than the Master Item ID number.

16. Select the **method** by which to sell the item, either by each or by weight/measure. If you price by variation, additional fields will appear at the bottom of the page for you to enter pricing.

17. Enter a **sales price** for the item.

18. (optional) If you are using the count by item guest counting method (see **Store Information** section) you can enter the count per item.

19. Select a **tax category** from the drop-down list.

20. (Optional) Flag the item as non-revenue if this is an item that can be sold at the POS but should not be reported in the net sales, like a donation item.

21. (Optional) Add the **unit cost** for calculating cost and margin.

22. Click **Save.**
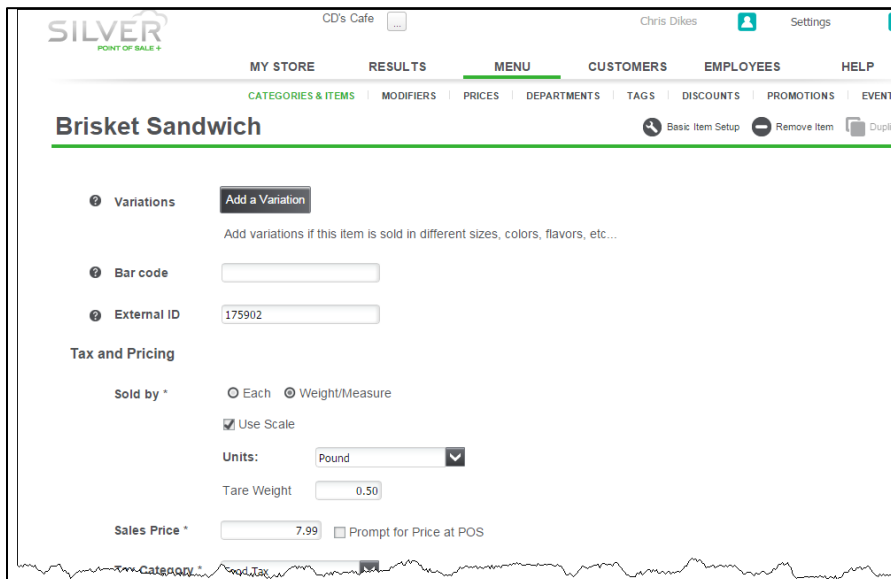
CREATING ITEMS FOR USE WITH A SCALE

For merchants that price items by weight, such as yogurt shops, salad bars, and BBQ restaurants, you can also configure items to be priced by weight.

When creating items priced by weight, you can also define a tare. Tare refers to the weight deducted from the gross item weight to allow for the weight of the container. When you establish tares, the total price of the product is calculated based on the net weight (gross weight minus tare weight) times the unit price.

To create an item for use with a scale (without variations):

1. In Silver Back Office, select **MENU > CATEGORIES & ITEMS**.

2. Select the **category** containing the item.

3. Select the **item**. The Item Details screen appears.

4. Under 'Tax and Pricing,' select **Weight/Measure**.

5. Select **Use Scale**.

6. Select the **unit measurement** from the drop down list.

7. Type the **tare weight**.

8. Type the **sales price** for the item.

9. Click **Save.**
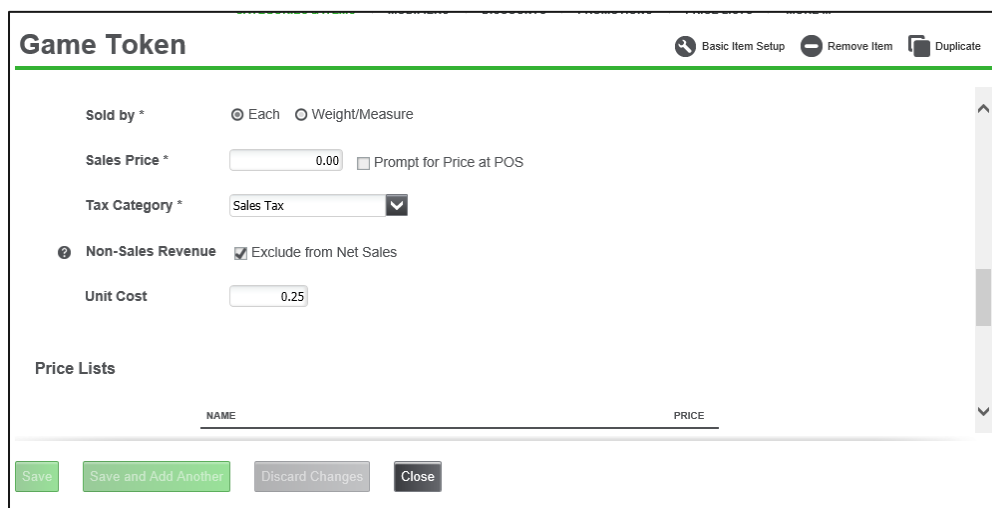
To create an item for use with a scale (with variations):

1. In Silver Back Office, select **MENU > CATEGORIES & ITEMS**.

2. Select the **category** containing the item.

3. Select the **item**. The Item Details screen appears.

4. Click **Add a Variation**. The Item Variations screen appears.

5. Select a **variation type**, such as size, and add the item variations, such as 'Small,' 'Medium,' and 'Large.'

6. Click **Done**. The system returns to the Extended Item Detail screen.

7. Under 'Tax and Pricing,' select **Use variation Size for pricing** from the Price drop-down list.

8. Select **Weight/Measure**.

9. Select **Use Scale**.

10. Select the **unit measurement** from the drop down list.

11. Type the **sales price** and the **tare weight** for each item variation

12. Click **Save.**

NON-REVENUE ITEMS

You can flag items as non-sales revenue if you want to sell them at the POS but exclude them from their net sales. This is often also used for donation items.
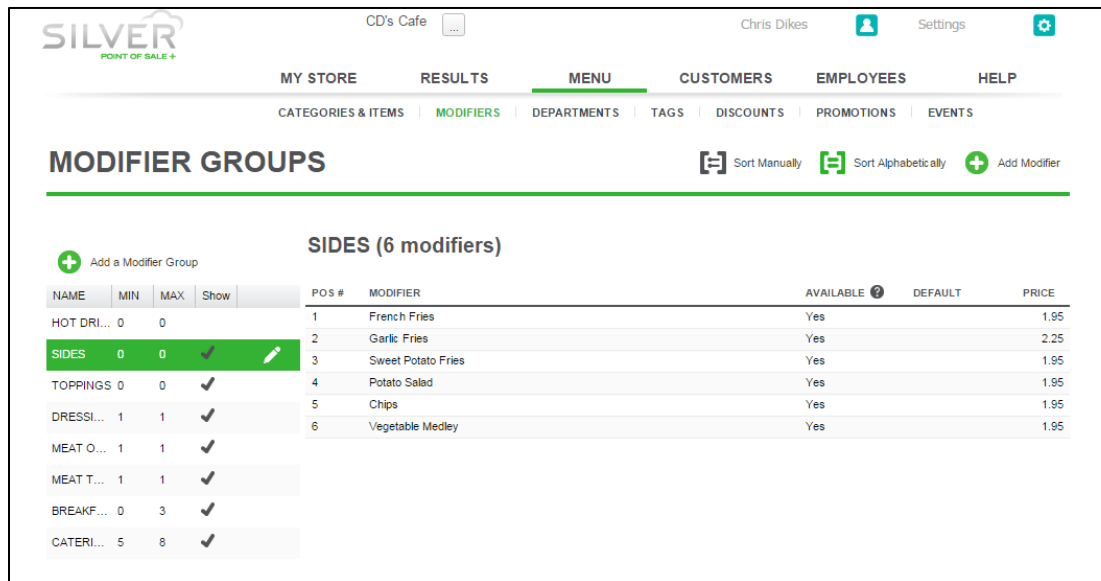
Non-sales revenue items can appear on the POS with other menu items, and can be used as part of promotions.

MODIFIER GROUPS AND MODIFIER ITEMS

Modifiers exist to provide the kitchen or bar specific instructions for how to prepare an order. These can be a special request, such as 'Lite Mustard,' a requirement, such as meat temperature, 'Steak– Medium Rare,' or an option on a side, such as 'Salad– Ranch Dressing.' Modifiers also allow you to charge extra for additional ingredients, such as 'Bacon' or 'Extra Cheese.' Modifier groups enable you to locate modifier items easily at the Point of Sale.

With NCR Silver Pro Restaurant, you can also price modifiers by variation. For example, you may want to charge different amounts for a modifier, such as 'Extra Cheese,' based on the size of the sandwich.
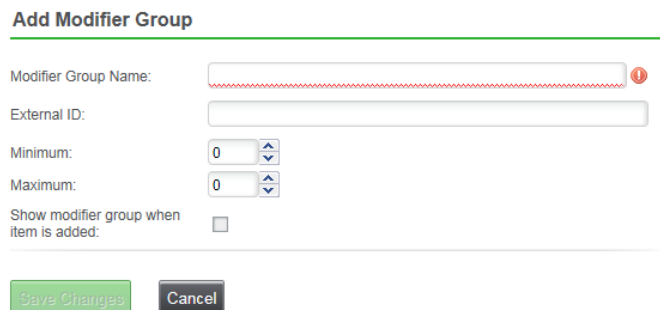
MODIFIER GROUPS

You can create as many modifier groups as necessary for your menu. When you configure a modifier group, you can define whether you want the prompt for the modifier group to appear when the parent menu item is selected. Additionally, you can rank the order in which modifier groups appear.

CREATING A MODIFIER GROUP

1. Select **MENU > MODIFIERS.**

2. Click **Add a Modifier Group**.

3. Type a **name** for the modifier group.

4. (Optional) Assign an **External ID number** to the modifier group. It is not necessary to enter an External ID number.

    -   If you leave External ID blank, the system populates the External ID with a system-assigned Master Item ID when you save the item record.

    -   If you enter a number for the External ID, the External ID number for the item will be different than the Master Item ID number.

5. Enter a **minimum quantity** for the modifier group, to define a minimum number of modifier items a customer

must select for the item.

- A minimum of '1' means the customer must select at least one modifier item from the modifier group.

- A minimum of '0' means the customer need not select a modifier item.

6. Enter a **maximum quantity** for the modifier group, which limits the maximum number of modifier items a customer can select for the item.

- A minimum of '1' and a maximum of '1' means you require a modifier, but the customer can only choose one modifier item. For example, meat temperature, such as 'Well Done' or 'Rare,' or a side choice, such as 'Fries' or 'Chips.'

- A minimum and maximum of '0' means you do not require the customer to make a modifier choice, but the customer can have unlimited modifier choices.

- A minimum of '1' and a maximum of '2' means a customer must choose at least one modifier, but can select no more than two modifiers.

7. (Optional) Click **Show modifier group** when item is added to force the system to display the modifier group options for an item without requiring the customer to select a modifier.

8. Click **Save**.

EDITING MODIFIER GROUPS

1. In Silver Back Office, select **MENU > MODIFIERS**.

2. Click 🖉 to the **right** of the modifier group you want to edit. The Edit Modifier group dialog appears.

3. Make the **desired changes**.

4. Click **Save Changes**.

RANKING MODIFIER GROUPS

You can rank modifier groups to change order in which they appear.

1. In Silver Back Office, select **MENU > MODIFIERS**.

2. Click **Sort Manually**.

3. Click ▲ to move a modifier group up one level or click ▼ to move a modifier group down one level. Repeat until you have the modifier groups ranked as desired.

4. Click **Done Sorting**.

MODIFIER ITEMS

Modifier items can be sold without variation and with variation of size. When modifier items are sold by variation of size, you can link the size of the modifier item to the size of the parent menu item. When you create modifier items, you must configure how you want to **sell** the modifier, **price** the modifier, and whether the modifier ought to be the **default** modifier item for the modifier group.
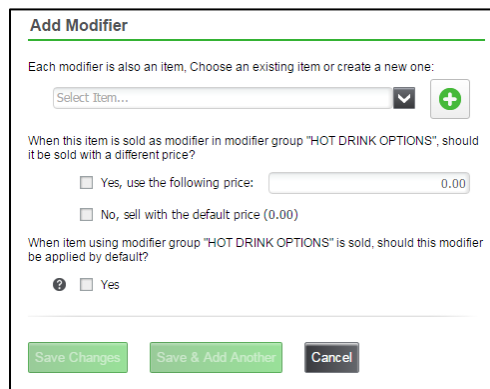
MODIFIER ITEMS WITHOUT VARIATIONS

In some situations, you may not want to sell the modifier item by variation. In one scenario, for turkey sandwiches, you have 'Tomato' as a modifier item to enable customers to customize their sandwich. In a second scenario, for steaks, you want customers to determine the meat temperature of their steak, and you create the following modifier items: 'Rare,' 'Medium,' and 'Medium Well.'

To add a modifier item without variations to modifier group:

You must first create the modifier item as an item without variations.

1. In Silver Back Office, select **MENU > MODIFIERS**.

2. Select the **Modifier group** for which you want to add the modifier.

3. Click **Add Modifier**. The Add Modifier dialog appears.

4. Select an **existing item** from the drop-down list to configure an item as a modifier item.

   -OR-

   Click '**+**' to add a new item. The Create Modifier Item dialog appears. Select a **category** from the drop-down list, type a **name** for the modifier item, and select a **tax category** from the drop-down list. Optionally, type a **price** for the item and an **external ID number**. You can leave the External ID blank and the system will assign a number to the modifier item. Click **Save Changes**.

5. Identify the **pricing** for the modifier. The system defaults to 'No, sell with the default price.' Select **Yes** to specify a price for the modifier that is different from the menu item price for the same item and then type a **price** for the item as a modifier.

6. (Optional) Select **Yes** to designate the modifier item as the default item for the modifier group. For example, if you cook all burgers to a medium well temperature unless otherwise requested, select medium well as the default choice.

7. Click **Save Changes**.

MODIFIER ITEMS WITH VARIATIONS

You can also sell modifier items by variation of size. This allows you to price modifier items according to the size of the menu item. For example, for turkey sandwiches, you offer the modifier item option of 'Extra Cheese.' You may want to charge more for extra cheese on a large sandwich rather than a small sandwich.

To sell a modifier with variations, the modifier item must be assigned variations and be priced according to variations.

When you choose to sell the modifier by variation, you can elect to create a modifier variation link, which connects the modifier variation **dimension** (i.e., size) to the parent menu item variation dimension. This allows the system to automatically apply the correct charge for the size of the modifier dimension based on the selection of the parent menu item. Also, when you enable the modifier variation link, employees cannot change the size of the modifier at the POS, they can only change the size of the parent menu item, which automatically changes the size of the modifier variation.

For example, you offer the following menu item, 'Turkey Sandwich,' available in the following sizes, 'S,' 'M,' and 'L.' You also create a modifier, 'Extra Cheese,' available in 'S,' 'M,', and 'L.' You then elect to sell it by variation and link the variation of the modifier to the parent menu item. When a customer orders a medium turkey sandwich with extra cheese, the system automatically applies the correct modifier dimension and any associated price. If the customer changes their mind and wants a small sandwich instead, the user changes the size of the sandwich and the system automatically changes the size of the modifier.

The system links the variation dimension (i.e., 'Size') of a modifier only when you configure the variation dimensions of the modifiers **exactly** as the variation dimensions of the parent item. Linking the dimension variations of the menu item and the modifier item requires they have the **same dimension name**, **same number of options**, and the **option names must be the same**.

The following table provides examples of menu and modifier items with variations and whether they can be linked.

Menu item with the following variation options	Modifier item with the following variation options	Can be linked
S, M, L	S, M, L	Yes
S, M, L	Small, Medium, Large	No
S, M, L	M, L	No
S, M, L	Regular, Large	No
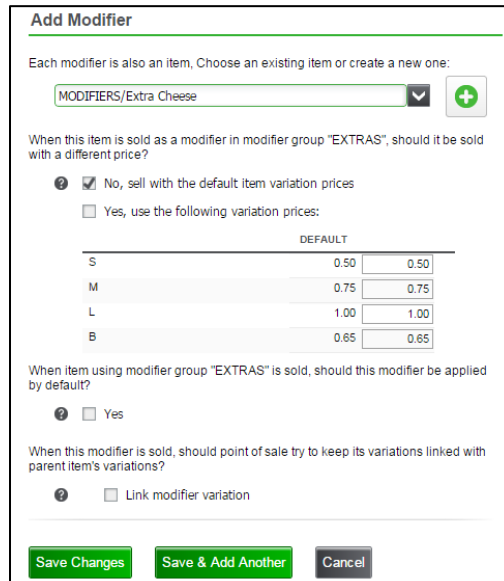
To add a modifier item with variations to a modifier group:

You must first create the modifier item as an item with variations.

1. In Silver Back Office, select **MENU > MODIFIERS**.

2. Select the **modifier group** for which you want to add the modifier item.

3. Click **Add Modifier**.

4. Select the **modifier** from the drop-down list.

   OR

Click to add a new modifier item. The Create Modifier Item dialog appears. Select a **category** from the drop-down list, type a **name** for the modifier item, and select a **tax category** from the drop-down list. Optionally, type a **price** for the item and an **external ID number**. You can leave the External ID blank and the system will assign a number to the modifier item. Click **Save Changes**.

5. Select the **pricing** for the modifier item. The system defaults to **No, sell with the default item variation prices**.

    -OR-

    Select **Yes, use the following variation prices**.

    When you select Yes, type the **price** for which you want to sell each variation for the modifier item.

6. (Optional) Select **Yes** to designate the modifier item as the default item for the modifier group.

7. (Optional) Select **Link modifier variation** to link the size of the modifier variation to the parent item. For example, you select a large sandwich and extra cheese. When you enable link modifier variation, the system automatically applies the large extra cheese modifier. When you change the sandwich to small, the system automatically changes the large extra cheese modifier to small. If you do not enable link modifier variation, you must manually change the size of the modifier item variation.

8. Click **Save Changes**.

EDITING, REMOVING, AND SORTING MODIFIERS

You can edit a modifier, remove it from a modifier group, and rank the appearance of the modifiers.

To edit or remove a modifier item from a modifier group:

1. In Silver Back Office, select **MENU > MODIFIERS**.

2. Select the **modifier group** containing the modifier item you want to edit or remove.

3. Select the **modifier item** you want to edit or remove.

4. Make the **desired edits** and click **Save Changes**.

    OR

Click **Remove Modifier** to remove the modifier item from the modifier group. A prompt appears. Click **OK**.

To sort modifier items within a modifier group:

You can rank modifier items within a modifier group or sort them alphabetically.

1. In Silver Back Office, select **MENU > MODIFIERS**.

2. Select the **modifier group** for which you want to sort modifier items.

3. Click **Sort Alphabetically** to sort the modifier items from A-Z.

    OR

    Click **Sort Manually** to manually sort the items. Use the up and down arrows to move a modifier item one level, or drag and drop into place. Repeat until you have the modifier items ranked as desired. Click **Done Sorting**.

IMPORTING ITEMS, CATEGORIES, AND MODIFIERS

Rather than using Silver Back Office to create categories, items, and modifiers manually, you can import your menu from a .csv file. Prior to importing a file, it is necessary to create tax categories and select one as your default. You cannot add tax categories using the Import Items function.

1. Select **Menu > Categories & Items**.

2. Click **Import Items**.

3. Click **Download Template**, and save the **file** as a .csv file.

4. Open the **file**, complete the **options**, and save the **file** as a .csv file.

    Although Silver Back Office allows for unlimited Modified By options, the import function only allows for five. You can add additional Modified By options in Silver Back Office after completing the import.

5. At the Import Items screen in Silver Back Office, click **Browse to Select File**, navigate to **the .csv file**, and click **Open**.

6. Click **Review Item List**. Silver Back Office checks for import errors.

    Silver Back Office places a red caution icon next to any row with an error. Click the icon to reveal the error. Other than tax category errors, you can either correct the error on the screen, or cancel the import, correct the error in the .csv file, and re-import the file.
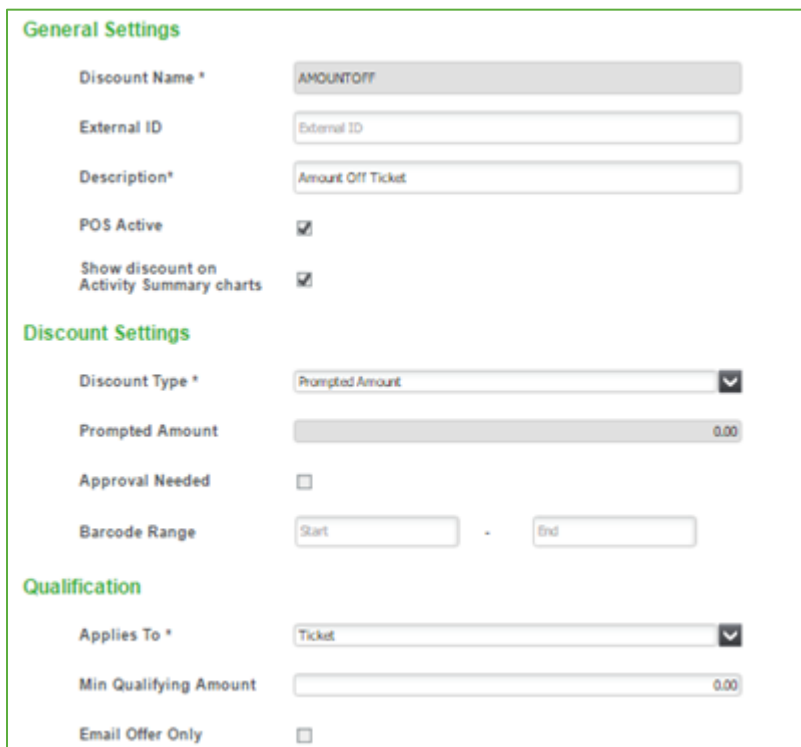
7. Click **Import Item List**.

8. At the Import Item List screen, click **OK**.

9. Click **Exit**.

DISCOUNTS

Use the Discounts menu to create a means by which you can provide discounts to your customers. The system allows both item level and ticket level discounts, applying item-level discounts first. You can also promote your discounts in an email message to your customers.

ADDING DISCOUNTS

1. Select **MENU > DISCOUNTS**.

2. Select **Add a Discount**.

3. Type a **name** for the discount. For discounts you plan to include in barcodes as part of email marketing, the name cannot contain any spaces.

4. (Optional) Type an **external ID** for the discount. You can leave this field blank and the system will automatically assign an external ID to the discount when you save the record.

5. Type a **description** for the discount.

6. (Optional) Clear **active** to deactivate the discount. By default, all new discounts are active.

7. (Optional) Clear **Show the discount on Activity Summary charts** to not have the discount calculated as part of the totals on the Activity Summary page. For example, you may not want to have Employee Discounts appear as part of the Discounts and Promotions calculation on the Activity Summary page to give you a more accurate reflection of the effectiveness of your discounts and promotions.

8. Select the **discount type** from the drop-down list.

    *   **Amount** provides for a fixed dollar discount amount. You must type the amount for the discount.

- **Percent** provides for a fixed discount percentage. You must type the percentage for the discount.

- **Prompted Amount** allows you to change the discounted amount during a sale.

- **Prompted Percent** allows you to change the discount percentage during a sale.

- **Set Item Price** allows you to create a discount price to apply to an item. You must type the item price for the discount. For example, if you sell many types of beers with different prices, you can create a special such as 'All Bottled Beer, $3.00 All Day Tuesday.'

9.   Type the **amount** or **percentage** for the discount.

10. (Optional) Select **Approval Needed** for a manager to authorize the discount on the POS.

11. (Optional) Type the **starting** and **ending barcode** range for the discount. The following apply to the barcode range:

- The barcode range must involve at least 1 alphanumeric character and no more than 20.

- The length of the start and end of the barcode strings must be the same.

- The barcode end range must be the same or greater than the barcode start range.

- The barcode ranges do not need to be unique across promotions.

12. Select either **Item** or **Ticket**, to specify the level at which to apply the discount.

13. If this is an item discount, type the **minimum item price** required to apply the discount.

-OR-

If this is a ticket discount, type the **minimum sale amount** required to apply the discount.

-OR-

Leave the amount as **$0.00**, if a minimum item price or sale amount is not required to apply the discount.

14. Select **Email Offer Only** to use the discount in your email marketing feature.

15. Click **Save Changes**.

PROMOTIONS

Promotions are an advanced form of discounts you configure to drive sales in your restaurant. Some examples of the promotions you can create include: BOGOs (Buy One Sandwich Get One Drink Free), combos (Buy One Sandwich, Chips, and Drink for $7.50), and coupons (Present this coupon to receive 10% off your order).

NCR Silver Pro Restaurant provides you with a variety of options for creating promotions. When creating a promotion, you define the promotion parameters through **General Settings**, **Buy**, and **Discount**. **General Settings** involves things such as the name of the promotion, when the promotion is available (all the time or for a specific event), the trigger for the promotion (automatically, apply manually by selecting from a list, or scan a barcode), and whether a manager must approve the promotion.

Buy defines the minimum quantity of items required, the tag containing the items, and the minimum check subtotal necessary, if any. Promotions rely on tags to specify the items required on a guest check for a promotion discount to apply. You can create tags prior to configuring promotions or you can do so when configuring promotions.

Discount specifies to what the discount applies (all of the items or a specific item), the type of discount (amount off, percentage off, or a set amount), and the amount of the discount. When you select percent off as the discount type, you can define a maximum discount amount to limit the potential dollar amount of the discount.

The following table provides an example of how a discount may apply:

Rule (To what items to apply the discount)	Discount by an amount	Discount by percentage	Discount to a set price
Apply to **all** the found items	Discount all the found items by a total dollar amount. *Example: When finding a specified sandwich, side, and drink, discount the items by a total amount of $0.50.*	Discount all the found items by a certain percentage. Define a maximum discount amount. *Example: When finding a specified sandwich, side, and drink, discount the items by 5%, but not more than $2.00.*	Set the price of all the found items to a specified dollar amount. *Example: When finding a specified sandwich, side, and drink, set the total price for these items to $7.00.*
Apply to items found by **one** of the rules	Discount each found item by a dollar amount. Limit how many found items can be discounted. *Example: When finding two sandwiches and two drinks, discount each drink by $0.80.*	Discount each found item by a certain percentage. Limit how many found items can be discounted. *Example: Find two shots, discount one of them by %100.*	Set the unit price for each found item. Limit how many found items can be discounted. *Example: Find two shots, price one of them at $3.00* *Example 2: Find five beers, price each of them at $4.00.*

When a promotion applies to a guest check, the discount appears as a line item on the guest check screen. As a promotion applies to items on the guest check, the system considers those items 'consumed.' If you create more than one promotion, Silver Back Office allows you to sort the order in which the POS evaluates promotions for inclusion on the guest check.

As part of the promotions feature, you should also review your user roles and access levels. Promotions rely on three access levels:

- To be able to add and edit promotions in Silver Back Office, an employee must have a user role with the 'Promotions' access level.

- To be able to add promotions to a guest check on the POS, an employee must have a user role with the 'Apply Discounts/Promotions' access level. This access level was formerly called 'Apply Discounts.'

- To be able to approve promotions requiring manager authorization, an employee must have a user role with the 'Approve Discounts/Promotions' access level.

For multi-site locations, companies can create promotions and assign them to store. At the store-level, you cannot edit promotions created at the company-level. However, stores can create their own promotions.

You can review promotions applied to guest checks on the Discounts and Promotions report in Silver Back Office.

An Overview of How Silver Pro Restaurant Adds Promotions to the Guest Check

If you add items to an order that trigger an automatic discount, when you manually apply another discount that uses some of the same items, the manually applied discount takes precedence over the automatically applied discount. The system applies the manual promotion and removes the automatic promotion, if the remaining items do not qualify for the automatically applied promotion.

For example, you have two promotion discounts, a manually applied promotion for 2 sandwiches for $6 and an automatic promotion of one sandwich, one chips, and one drink for $7.50. In one scenario, you add two sandwiches, apply the manual promotion, and then add the drink and chips. The manual promotion applies and the system never applies the automatic promotion.

In a second scenario, you add the following: one sandwich, one chips, and one drink. The system applies the automatic promotion. You then add a second sandwich and apply the manual promotion of 2 sandwiches for $6. The system applies the manual promotion and removes the automatic promotion.

An Overview of How Silver Pro Restaurant Removes Promotions From the Guest Check

A promotion discount can be removed in one of the following ways:
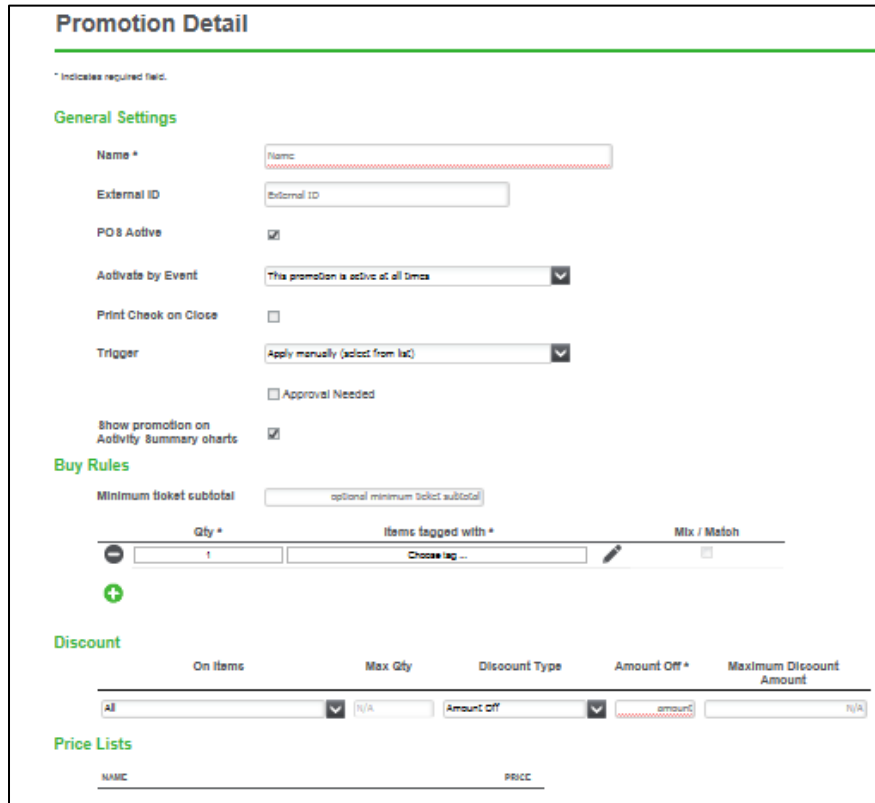
- An item included in the promotion is voided or cleared from the guest check.

- An item included in the promotion no longer contains the required quantity for the promotion to apply.

- A split ticket causes items participating in the promotion to no longer be on the same ticket.

- An employee manually removes a manually added promotion.

- An employee manually adds a promotion that uses items required by an automatic promotion. The system removes the automatic promotion if the remaining items do not meet the qualifications for the promotion.

CONFIGURING PROMOTIONS

You can create a number of different promotions. This section includes a general overview of the options for configuring a promotion and is followed by five examples of configuring different promotions. The scenarios that follow are examples of some common promotions and are not exhaustive of all the possible types of promotions you can create with NCR Silver Pro Restaurant.

To configure a promotion:

1. In Silver Back Office, select **MENU > PROMOTIONS**.

2. Click **Add a Promotion**.

3. Under 'General Settings,' type a **name** for the promotion. The name will appear on the guest check screen when you apply the promotion.

4. (Optional) Type an **external ID** for the promotion. You can leave this field blank and the system will automatically assign an external ID to the promotion when you save the record.

5. (Optional-Single Site merchants only) Clear **Available** to disable the promotion. By default, NCR Silver Pro Restaurant enables promotions.

6. (Multi-Sites only) At the company level, click **Assign** to assign the promotion to stores.

7. (Optional) Select an **event** from the drop-down list to activate the promotion. Leave the field blank to make the promotion active at all times.

8. (Optional) Select **Print check on close** to print a duplicate receipt when you close the check.

9. Select a **trigger** for the promotion from the drop-down box. The available options are:

    *   **Apply manually (select from list)** to require employees to select the promotion from a list on the POS. Only the promotions that can apply to the guest check appear for an employee to select.

    *   **Detect automatically** to have the system automatically apply the promotion when the guest check meets the requirements of the promotion.

- **Scan barcode** to require employees to scan a barcode to apply the promotion. When selecting scan barcode, it is necessary to configure the barcode range. The following apply to the barcode range:

    o The barcode range must involve at least 1 alphanumeric character and no more than 20.

    o The length of the start and end of the barcode strings must be the same.

    o The barcode end range must be the same or greater than the barcode start range.

    o The barcode ranges do not need to be unique across promotions.

10. (Optional) Select **Approval needed** for a manager to authorize the promotion on the POS. This option is only available when you select 'Apply manually' or 'Scan barcode' as the promotion trigger.

11. (Optional) Clear **Show the discount on Activity Summary charts** to not have the discount calculated as part of the totals on the Activity Summary page. For example, you may not want to have Employee Discounts appear as part of the Discounts and Promotions calculation on the Activity Summary page to give you a more accurate reflection of the effectiveness of your discounts and promotions.

12. (Optional) Under 'Buy,' enter the **amount** for the minimum ticket subtotal for the promotion to apply. You can leave this blank if you do not want to require a minimum.

13. Define the **first rule** for the promotion:

    - Update the **quantity**, if greater than '1.'

    - Select the **tag** containing the items for the promotion.

    - (Optional) Clear **Mix/Match** to require all items meeting the condition of the rule to be exactly the same. For example, in a sandwiches promotion, if Mix/Match is not enabled, both sandwiches must be the same, as in meatball sandwich. By default, NCR Silver Pro Restaurant enables Mix/Match, which allows different items with the same tag to be combined to meet the rule's condition. For example, in a sandwiches promotion, if Mix/Match is enabled, one sandwich could be a meatball and another could be turkey. If the rule quantity is '1,' then Mix/Match is not an available option.

14. Click to ⊕ add an **additional rule** for the promotion and repeat step 12. For some promotions, you may have multiple rules, particularly if you are creating a promotion with items from different tags.

15. Under 'Discount,' select the **rule** for which the discount applies. The system defaults to 'all.'

    - When you select a specific rule for the discount, the discount only applies to that rule. For example, you have a BOGO promotion of buy one sandwich get one drink free. You would apply the discount to the rule containing the drink tag.

16. Select the **quantity** for the discount. For example, if you are providing a BOGO coupon, the discount applies to '1' item. If you are providing a 'Buy 4 shots, get 2 half off,' the discount applies to '2' items.

17. Select the **discount type** from the drop-down list. The options are:

    - **Percent Off** to provide a discount in the form of a percentage, such as 50% off.

    - **Amount Off** to provide a discount in the form of a dollar amount, such as $2.00 off.

    - **Set Amount** to provide a discount as a set sales amount, such as $7.50. This causes the system to charge a set amount for the items.

18. Type the amount for the discount.

19. (Optional) Type the **maximum discount** amount. You can only enter a maximum discount amount for the promotion when using Percent Off. A maximum discount amount provides a limit you are willing to discount. For

example, you create a promotion for 50% off and you add a maximum discount amount of $10. If the promotion items total $15, the discount is $7.50. If the promotion items total $30, the discount is $10 rather than $15, since $10 is the maximum dollar amount you want to discount.
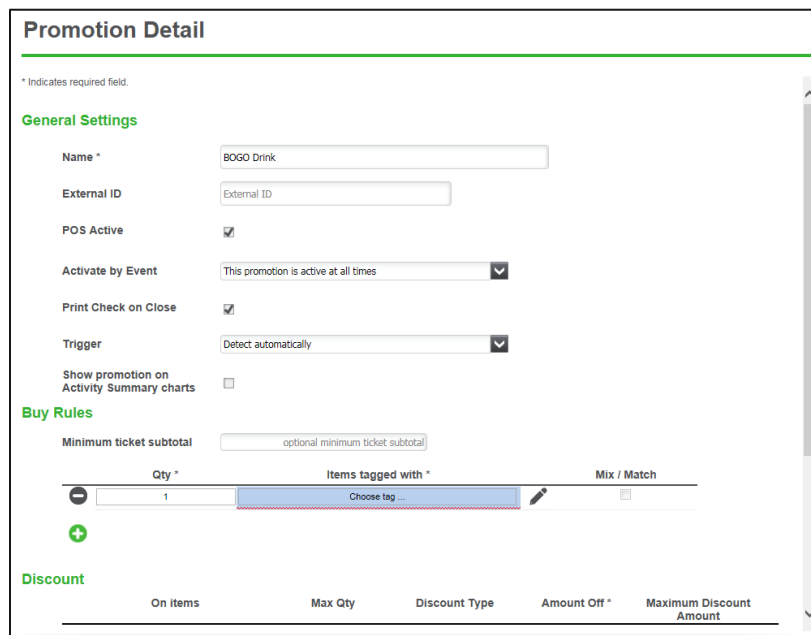
20. Click **Save**.

SCENARIO 1: BOGO

You want to create a promotion where the purchase of one sandwich allows for one free drink. You also want the promotion to apply automatically and you limit the maximum discount amount to $2.00. Prior to creating the promotion, you create two tags, one for sandwiches and one for drinks.

The system processes the promotion as follows: When the guest check contains one item from each tag group, the system automatically discounts the item from the drinks tag by 100% up to $2.00.

1. In Silver Back Office, select **MENU > PROMOTIONS**.

2. Click **Add a Promotion**.

3. Type a **name** for the promotion, such as 'BOGO Drink.''

4. (Multi-Sites only) At the company level, click **Assign** to assign the promotion to stores.

5. Leave the **Event field blank** to make the promotion active at all times.

6. Select **Print check on close** to print a duplicate receipt when you close the check.

7. Select **Detect automatically** as the event trigger.

8. (Optional) Clear **Show the discount on Activity Summary charts** to not have the discount calculated as part of the totals on the Activity Summary page. For example, you may not want to have Employee Discounts appear as part of the Discounts and Promotions calculation on the Activity Summary page to give you a more accurate reflection of the effectiveness of your discounts and promotions.

9. Under 'Buy,' for the first rule of the promotion, select the **Sandwich** tag.

10. Click ⊕ to add a **second rule** for the promotion and select the **Drink** tag.

11. Under 'Discount,' select **Drinks (rule#2)** from the drop-down list.

12. Type **1** for the quantity.

13. Select **Percent Off** from the Type drop-down list.

14. Type **100** for the percent off.

15. Type **$2.00** for the maximum discount amount. If the drink costs more than $2.00, the system will only provide a discount for $2.00.

16. Click **Save**.

SCENARIO 2: HAPPY HOUR SPECIAL

You want to create a promotion where you sell 2 beers and the second beer is 50% off. You want the promotion to apply automatically during the Happy Hour event and the maximum discount amount is $5.00. Prior to creating the promotion, you create a Beer tag and a Happy Hour event.

The system processes the promotion as follows: When the guest check contains two items from the tag during the Happy Hour event, the system automatically applies a 50% discount to the lower priced item up to $5.00.

1. In Silver Back Office, select **MENU > PROMOTIONS**.

2. Click **Add a Promotion**.

3. Type a **name** for the promotion, such as 'Happy Hour Beer Special.''

4. (Multi-Sites only) At the company level, click **Assign** to assign the promotion to stores.

5. Select the **Happy Hour event** from the drop-down list.

6. (Optional) Select **Print check on close** to print a duplicate receipt when you close the check.

7. Select **Detect automatically** as the event trigger.

8. (Optional) Clear **Show the discount on Activity Summary charts** to not have the discount calculated as part of the totals on the Activity Summary page. For example, you may not want to have Employee Discounts appear as part of the Discounts and Promotions calculation on the Activity Summary page to give you a more accurate reflection of the effectiveness of your discounts and promotions.

9. Under 'Buy,' for the first rule of the promotion, type '**2**' for the quantity and select the **Beer** tag.

10. Under 'Discount,' select **Beer (rule #1)** for on items, as you only want to provide a discount to the second beer.

11. Select **Percent Off** from the Type drop-down list.

12. Type **50** for the percent off.

13. Type **5** for the maximum discount amount.

14. Click **Save**.

SCENARIO 3: COMBO

You want to create a combo promotion where you sell one sandwich, one chips, and one soft drink for the set price of $7.50. You want the promotion to apply automatically. Prior to creating the promotion, you create three tags: one for sandwiches, one for chips, and one for drinks.

The system process the promotion as follows: When the guest check contains one item from each tag, the system automatically applies the defined set price.

1. In Silver Back Office, select **MENU > PROMOTIONS**.

2. Click **Add a Promotion**.

3. Type a **name** for the promotion, such as 'Sandwich, Chips, Drink combo.''

4. (Multi-Sites only) At the company level, click **Assign** to assign the promotion to stores.

5. Leave the **event field** blank to make the promotion active at all times.

6. (Optional) Select **Print check on close** to print a duplicate receipt when you close the check.

7. Select **Detect automatically** as the event trigger.

8. (Optional) Clear **Show the discount on Activity Summary charts** to not have the discount calculated as part of the totals on the Activity Summary page. For example, you may not want to have Employee Discounts appear as part of the Discounts and Promotions calculation on the Activity Summary page to give you a more accurate reflection of the effectiveness of your discounts and promotions.

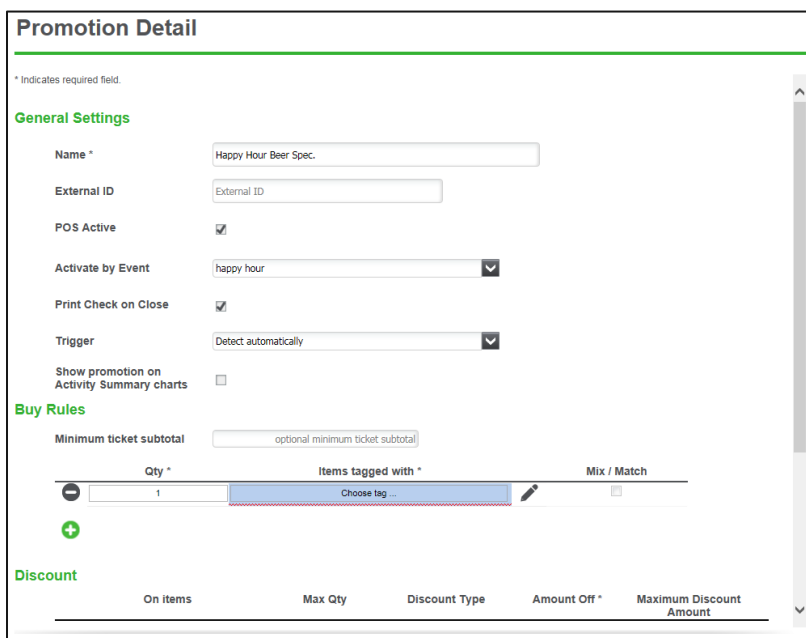9. Under 'Buy,' for the first rule of the promotion, select the **Sandwich** tag.

10. Click to create a second rule for the promotion and select the **Chips** tag.

11. Click to create a third rule for the promotion and select the **Drinks** tag.

12. Under 'Discount,' select **All** for on items.

13. Select **Set Price** from the Type drop-down list.

14. Type **7.50** for the set price amount.

15. Click **Save**.
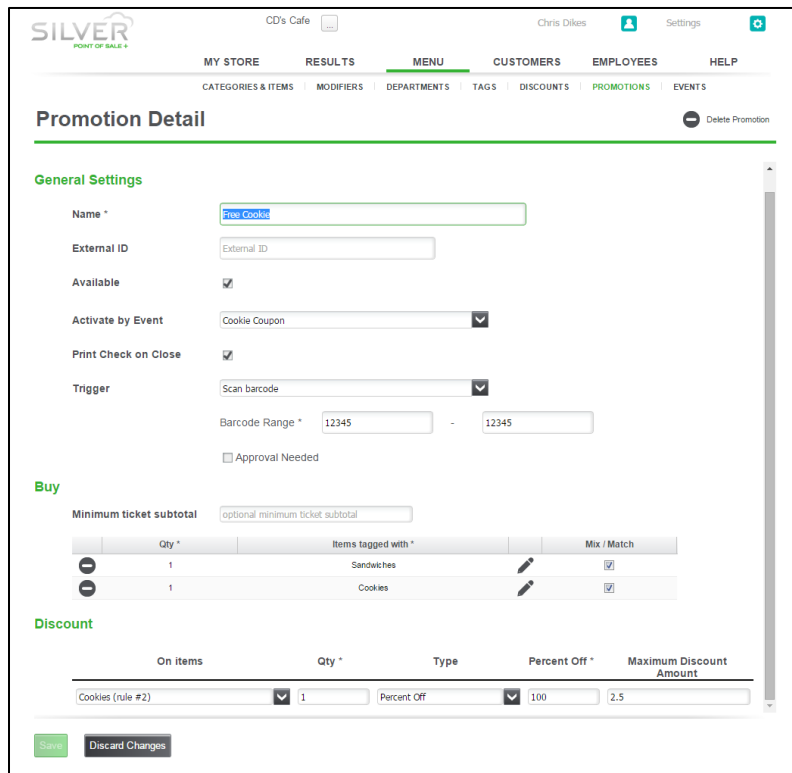
SCENARIO 4: COUPON

You want to create a promotion for a free cookie with the purchase of a sandwich and the presentation of a coupon. The promotion will only be good for the month of April. Additionally, you want to cap the maximum discount amount at $2.50. Prior to creating the promotion, you create two tags, one for sandwiches and one for cookies. You also create an event for the promotion.

The system process the promotion as follows: The customer presents the coupon at the time of payment. The employee scans the coupon and the system confirms the guest check contains the necessary items for the promotion to apply. If it does, the system applies the discount to the cookie up to $2.50.

1. In Silver Back Office, select **MENU > PROMOTIONS**.

2. Click **Add a Promotion**.

3. Type a **name** for the promotion, such as 'Free Cookie.''

4. (Multi-Sites only) At the company level, click **Assign** to assign the promotion to stores.
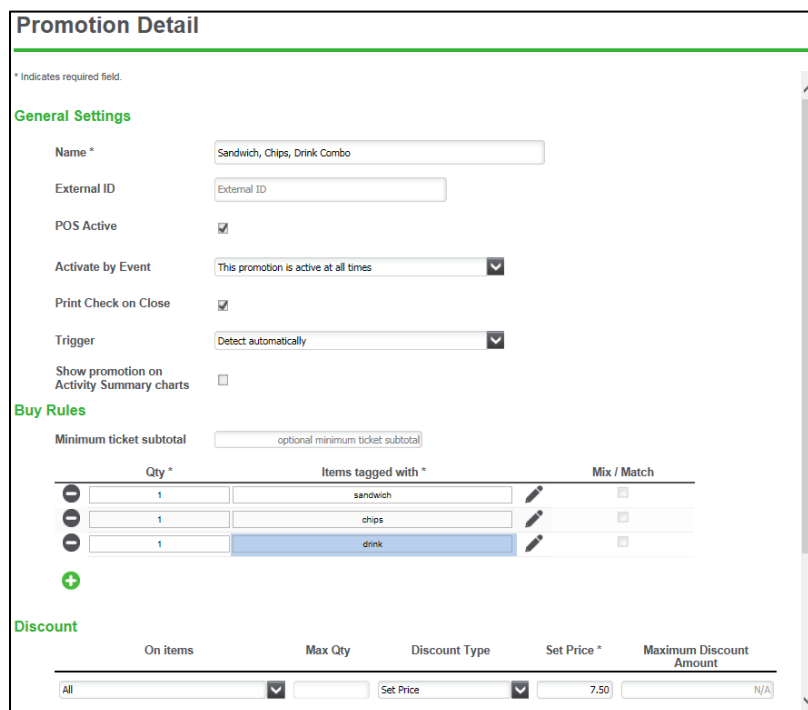
5. Select the **event** from the drop-down list.

6. Select **Print check on close** to print a duplicate receipt when you close the check.

7. Select **Scan barcode** as the event trigger.

8. Type the **starting** and **ending barcode range**.

9. (Optional) Clear **Show the discount on Activity Summary charts** to not have the discount calculated as part of the totals on the Activity Summary page. For example, you may not want to have Employee Discounts appear as part of the Discounts and Promotions calculation on the Activity Summary page to give you a more accurate reflection of the effectiveness of your discounts and promotions.

10. Under 'Buy,' for the first rule of the promotion, select the **Sandwich** tag.

11. Click ⊕ to create a second rule for the promotion and select the **Cookies** tag.

12. Under 'Discount,' select **Cookies (rule #2)** for On items.

13. Select '**1**' for the quantity.

14. Select **Percent Off** from the Type drop-down list.

15. Type **100** for the percent off.

16. Type **2.50** for the maximum discount amount.

17. Click **Save**.

SCENARIO 5: AMOUNT OFF

You want to create a promotion for $3.00 off one hamburger when a customer purchases two hamburgers. You want the promotion to require the presentation of a coupon and have a manager authorize the discount. Additionally, the promotion is only to apply for the month of April. Prior to creating the promotion, you create one burger tag and an event for the promotion.

The system processes the promotion as follows: The customer presents the coupon at the time of payment. The employee scans the coupon and the system confirms the items are from the Burger tag. If the guest check meets the promotion requirements, the system prompts the employee for manager authorization to apply the discount. The system captures a count of which barcode and promotion has been scanned.

1. In Silver Back Office, select **MENU > PROMOTIONS**.

2. Click **Add a Promotion**.

3. Type a **name** for the promotion, such as '$3 Off Burger.'

4. Select **Available** to enable the promotion.

5. Select the **event** for the promotion, such as 'Burger Special.'

6. Select **Print check on close**.

7. Select **Scan barcode** as the trigger.

8. Type the **starting** and **ending barcode range**.

9. Select **Approval needed**.

10. (Optional) Clear **Show the discount on Activity Summary charts** to not have the discount calculated as part of the totals on the Activity Summary page. For example, you may not want to have Employee Discounts appear as part
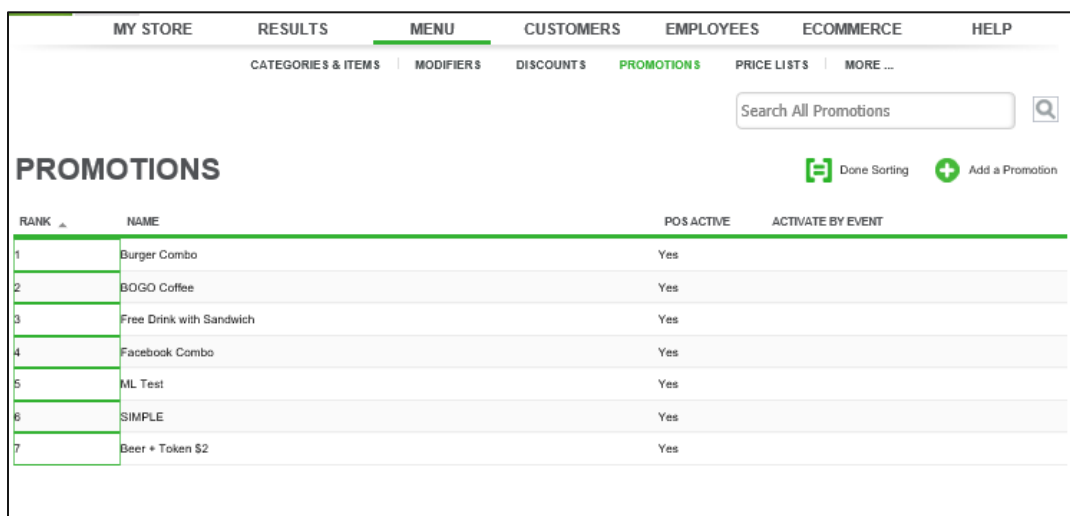
of the Discounts and Promotions calculation on the Activity Summary page to give you a more accurate reflection of the effectiveness of your discounts and promotions.

11. Under 'Buy,' for the first rule of the promotion, type **2** for the quantity and select the **Burgers tag** from the drop-down list.

12. Under 'Discount,' select **Burgers (rule#1)** for on items, as you only want to discount the second burger.

13. Type **1** for the quantity.

14. Select **Amount off** from the Type drop-down list.

15. Type '**3.00**' for the amount off.

16. Click **Save**.

SORTING PROMOTIONS

After you create promotions, you can sort the order in which the POS seeks to apply them. The POS stops searching for promotions once it finds the first promotion that applies to the guest check.

For multi-site operations, additional rules apply when sorting promotions. At the company level, you can sort all promotions. At the store level, you can only sort promotions created at the store level.

1. In Silver Back Office, select **MENU > PROMOTIONS**.

2. Click **Sort Order**.

3. Enter the Enter the rank in which you want to order the promotions, 1 being the first in line.

4. Click **Done Sorting**.

DELETING PROMOTIONS

In some cases, you may wish to delete a promotion, which you can do in Silver Back Office at the PROMOTIONS page. However, if you think you may use the promotion at some point in the future, you may want to deactivate the promotion rather than deleting it.

1. In Silver Back Office, select **MENU > PROMOTIONS**.

2. Select the **promotion** you want to delete.

3. Click **Remove promotion**. A warning prompt appears.

4. Click **OK**.

PRICE LISTS

Price Lists are a convenient way for you to manage all of your prices in NCR Silver Pro Restaurant. Price Lists allow you to quickly update prices in one place in Silver Back Office without having to edit each item record. Additionally, you can schedule when you want the prices to take effect. Price Lists also enable you to schedule and manage pricing for events and promotions.

For multi-stores, you can use price lists to manage pricing for individual stores. Users assigned to a specific store can only see the price lists assigned to their store. Additionally, price lists can be created at the store level.

Price Lists allow you to set prices for:

- Items and items with variations.

- Modifier items and modifier items with variations (as long as the modifier is set to be priced differently than the underlying item).

- Promotions using Set Price and Amount Off discounts.

How does the POS know which price to apply?

- First, the POS checks for an **active event-based price list**. If two or more event-based price lists overlap (i.e., the events occur at the same time), the POS uses the price list with the higher ranking. (See 'Ranking Event-Based Price Lists.')

- If an active event-based price list does not exist, the POS checks for an **active non-event based price list**.

- (Multi-store only) If a non-event based price list does not exist, the POS uses the **store override price**, if any.

- If a non-event based price list does not exist and a store override price does not exist, the POS uses the **company price**. This is the price assigned to the object on the corresponding item or modifier record.

How does the POS know which price to use when a promotion applies?
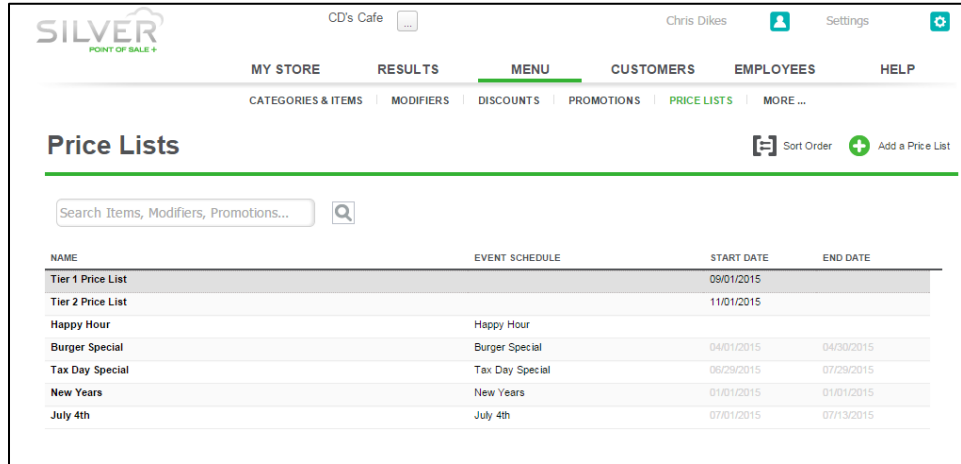
- First, the POS checks for an **active event-based price list**. If two or more event based price lists overlap, the POS uses the price list with the higher ranking. (See 'Ranking Event-Based Price Lists.')

- If a active event-based price list does not exist, the POS checks an **active non-event based price list**.

- If an active non-event based price list does not exist, the POS uses the value from the **promotions page**.

With price lists, NCR Silver Pro Restaurant adds one new access level, 'Price Lists,' which allows you to control the users who can access the Price Lists page in Silver Back Office. Review your user roles to ensure they possess the appropriate access levels.

CONFIGURING PRICE LISTS

When you create a price list, you can associate it to an event or you can set a specific start date. If you do not assign an event or a specific start date, the start date is considered to be the current date and the new price list takes effect at the next data sync.

CONFIGURING A NON-EVENT BASED PRICE LIST

1. In Silver Back Office, select **MENU > PRICE LISTS**.

2. Select **ADD A PRICE LIST**.

3. Under 'Price List Settings,' type a **name** for the price list.

4. Use the **default setting**, 'This Price List is Active At All Times.' You can use the start and end date to control the activation of the price list. To create a price list with an event, see 'Configuring an Event-Based Price List.'

5. (Optional) Select a **start date** for the price list. The start date allows you to create a price list and have it take effect on a certain date, rather than immediately. If you want the price list to take effect immediately, leave the start date blank.

6. Optional) Select an **end date**. If you do not want to have an end date for the price list, leave end date blank.

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

7. (Multi-Store only) Click **Assign Stores** to assign the price list to a store. The Stores screen appears. Select the **stores** for which to assign the price list and click **Done**.

8. Select which **Order Modes** the price list should be applied to.

9. Under 'Prices,' select the **filter** by which to edit prices from the drop-down list. The options are 'All,' Items,' 'Modifiers,' and 'Promotions.'

   -OR-

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

The matching objects appear on the screen. Each object is identified with:

- An **object type**, such as 'Item,' 'Item Variation,' 'Modifier,' 'Modifier Variation,' and 'Promotion.'

- An **object identifier**, such as 'Category,' 'Modifier Group,' or 'Promotion.'

- The **item name**.

- The **default price**, which is the price of the object on the individual record.

10. Under 'List Price,' type the **price** for the item.

11. Click **Save**.

CONFIGURING AN EVENT-BASED PRICE LIST

Event-based price lists allow you to set the prices of items for an event on one screen, rather than having to edit each individual item. Prior to creating an event-based priced list, you must create the event at MENU > EVENTS.

1. In Silver Back Office, select **MENU > PRICE LISTS**.

2. Select **ADD A PRICE LIST**.

3. Under 'Price List Settings,' type a **name** for the price list.

4. Select an **event** from the drop-down list to associate with the price list. When you select an event for a price list, you cannot add a start date or an end date for the price list. The occurrence of the price list for the event is determined by the event configuration on the Events page.

5. (Multi-Store only) Click **Assign Stores** to assign the price list to a store. The Stores screen appears. Select the **stores** for which to assign the price list and click **Done**.

6. Select which **Order Modes** the price list should be applied to.

7. Under 'Prices,' select the **filter** by which to edit prices from the drop-down list. The options are 'All,' Items,' 'Modifiers,' and 'Promotions.'

    -OR-

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

The matching objects appear on the screen. Each object is identified with:

- An **object type**, such as 'Item,' 'Item Variation,' 'Modifier,' 'Modifier Variation,' and 'Promotion.'

- An **object identifier**, such as 'Category,' 'Modifier Group,' or 'Promotion.'

- The **item name**.

- The **default price**, which is the price of the object on the individual record.

8. Under 'List Price,' type the **price** for the item.

9. Click **Save**.

EDITING A PRICE LIST

You can easily edit a price list.

1. In Silver Back Office, select **MENU > PRICE LISTS**.

2. Select the **price list** you want to edit. The Edit Price List screen appears.

3. Make the **necessary changes**.

4. Click **Save**.

DUPLICATING A PRICE LIST

In some cases, you may want to duplicate an existing price list. For example, you created a price list for 2015 and now you want to create a price list for 2016. You can duplicate the 2015 price list and edit the prices.

1. In Silver Back Office, select **MENU > PRICE LISTS**.

2. Select the **price list** you want to duplicate.

3. Click **Duplicate Price List** on the top right of the screen. The system duplicates the price list and retains all of the information except the name. In Multi-Store, if you assigned the original price list to a specific set of stores, the duplicated price list will be assigned to those same stores. Click Assign Stores to edit the store assignment of the price list.

4. Type a **name** for the duplicated price list.

5. Make any other **necessary changes**.

6. Click **Save**.

REMOVING A PRICE LIST

In some cases, you may want to remove a price list. You can easily do so.

1. In Silver Back Office, select **MENU > PRICE LISTS**.

2. Select the **price list** you want to remove.

3. Click **Remove Price List** on the top right of the screen. A prompt appears.

4. Click **OK**. The system removes the price list and returns to the Price Lists screen.

RANKING EVENT-BASED PRICE LISTS

Event-based price lists have priority over non-event based price lists, when both are active. On occasions when two event-based price lists overlap, the POS uses the event-based price list with the higher ranking. You can sort event-based price lists to designate one with a higher ranking than the other should they overlap.

1. In Silver Back Office, select **MENU > PRICE LISTS**.

2. Click **Sort Order** on the top right side of the screen.

3. Select the **price list** you want to sort.

4. Click ▲ to move a price list up one level or click ▼ to move a price list down one level.

5. Click **Done Sorting.**

VIEWING PRICE LISTS ON THE POS

On the POS, you can view which price lists are currently active and which are upcoming.

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

2. Tap **Details**.

3. Tap **Price Lists**. The Price Lists screen appears.

‹ Details	Price Lists
ACTIVE PRICE LISTS	
Happy Hour Price List	Ends at 2015-Jul-02 10:30 AM
Event: Happy Hour	Mon, Tue, Wed, Thu, Fri (12:00 AM - 10:30 AM)
Tier 2 Price List	Has no end date.
No Event	
UPCOMING PRICE LISTS	
Tier 1 Price List	Starts at 2015-Sep-01
No Event	

4. Tap **Details**.

5. Tap **Close**.

DEPARTMENTS
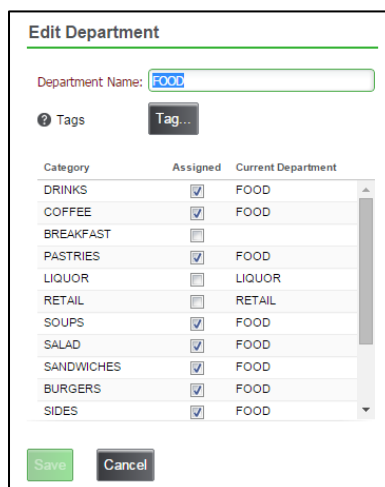
Use the Departments menu to organize your categories. For example, when viewing reports, you may want to evaluate your restaurant according to departments, such as, 'Food,' 'Beverage,' and 'Alcohol,' rather than by categories such as, 'Sandwiches,' and 'Soups.' The Department Sales Report includes an option for you to display the corresponding categories for each department on the report.
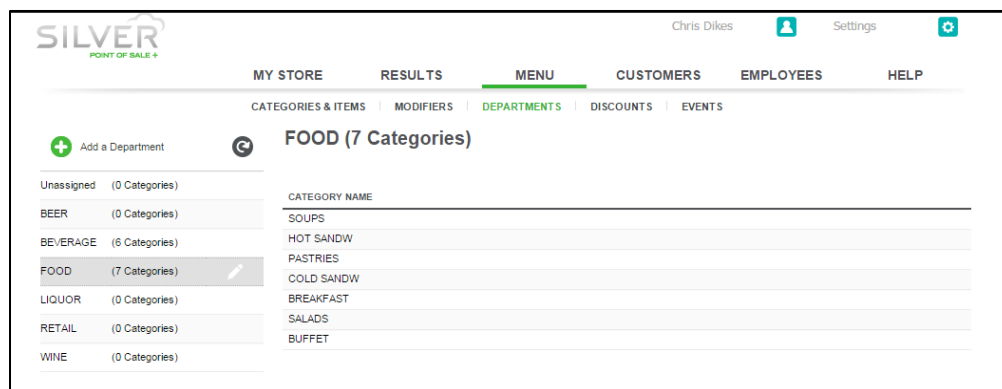
NCR Silver Pro Restaurant includes five default departments, 'Food,' 'Liquor,' 'Beer,' 'Wine,' and 'Retail.' You can add additional departments and remove existing ones, as long as the department does not contain any categories. When you move a category from one department to another, the system automatically removes the category from the previous department as categories can only belong to one department.

ADDING A DEPARTMENT

1. Select **MENU > DEPARTMENTS**.

2. Click **Add a Department**.

3. Type the **name** for the department.

4. (Optional) Click **Tag** to assign tags to the department.

5. Select the **categories** to assign to the department.

6. Click **Save**.

EDITING A DEPARTMENT

You can assign categories to a department, or delete a department. You can only delete a department with no categories assigned to it.

1. Select **MENU > DEPARTMENTS**.

2. Click [✎] next to the department you wish to edit or remove.

3. Select the **categories** to assign to the department and click Save.

   -OR-

   Select **Remove** to delete the category and tap **OK**.

TAGS

Tags are a way to group items for things such as promotions. Tags can include departments, categories, items, and items with variations, which are referred to as objects in this guide. When you configure a promotion, NCR Silver Pro Restaurant uses tags to identify the items required for a promotion to apply.

Before you configure a promotion, you must first create a tag. Tag creation and editing occurs in Silver Back Office and requires the access level 'Tags.' You can create a tag at the TAGS page or when creating a promotion. You can assign a department, category, item, or item with variation to a tag at the specific object page. For multi-site locations, you can only create and edit tags at the company–level. Tags are read-only at the store level.

Other important information regarding tags:
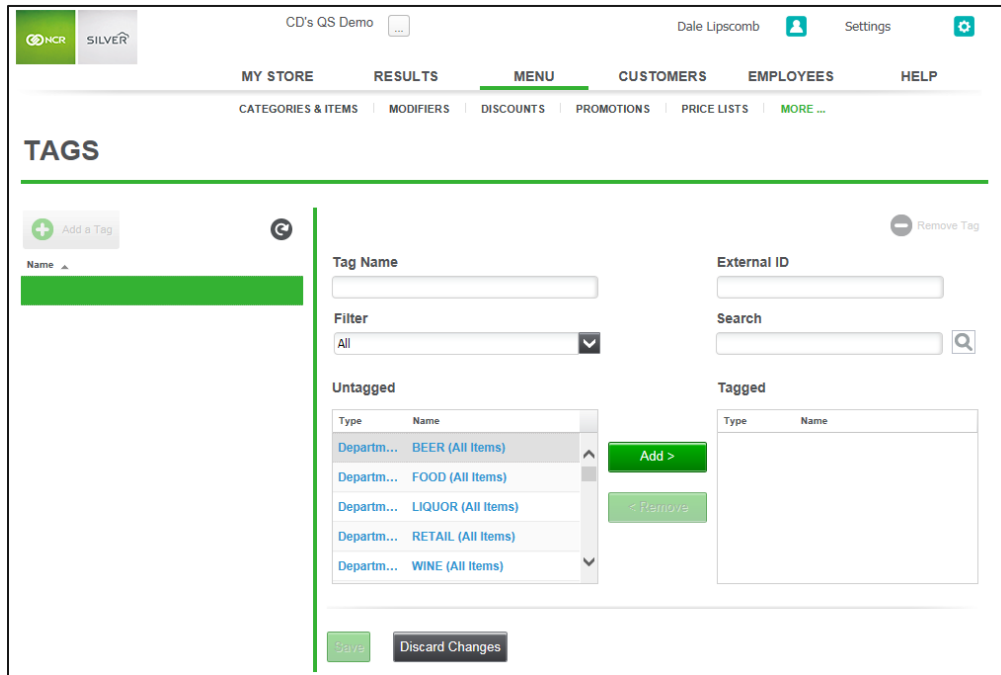
- You can have multiple tags.

- A department, category, item, or item with variation can belong to different tags.

- When you assign a department or a category to a tag, all items belonging to the department or category belong to the tag.

- You cannot create tags from the POS.

- The Item Import function does not support tag assignment.

- The Edit Multiple Items function does not support tag assignment.

- If a promotion uses a tag, you cannot delete the tag.

CONFIGURING TAGS

To create a tag and assign objects to the Tag:

1. In Silver Back Office, select **MENU > TAGS**.

2. Click **Add a Tag**.

3. Type a **name** for the tag.

4. Type an **external ID** number (optional. Used in 3rd part solutions).

5. Select a **method** by which to filter the items available to tag from the drop-down box. The options are 'All,' 'Departments,' 'Categories,' 'Items,' and 'Item variations.' The system defaults to 'All.' The objects available to tag appear under 'Matching untagged objects.'

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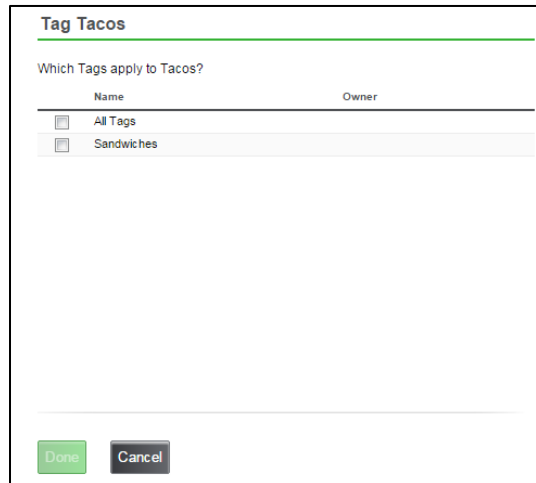
   Type the **name** of the object to search and click to initiate a search. The search results appear under 'Matching untagged objects.' You can type the entire name of the object or a string of characters. For example, if you type 'be,' the search results include all objects containing the character string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

5. Under 'Matching untagged objects,' select the **object** to tag and click **Tag**. The system moves the object to 'Matching tagged objects.'

6. Repeat **steps 4 through 5** to add additional objects to the tag.

7. Click **Save**.

To assign an individual item to a tag:

1. In Silver Back Office, select **MENU > CATEGORIES & ITEMS**.

2. Select the **item** to tag. The Item Details screen appears.

3. Click **Tag**. The Tag dialog appears.
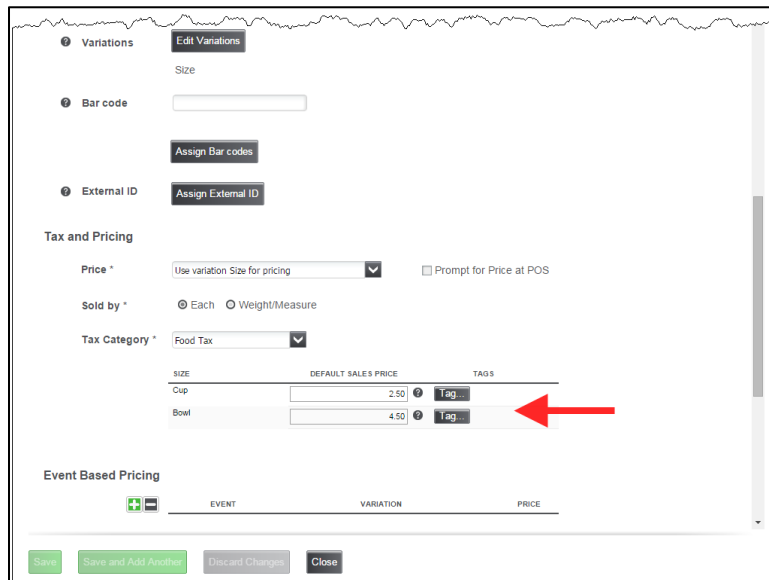
4. Select the **tags** to apply to the item.

5. Click **Done**. The system returns to the Item Details screen.

6. Click **Save**.

To assign an item with a variation to a tag:

1. In Silver Back Office, select **MENU > CATEGORIES & ITEMS**.

2. Select the **item with variations** to tag. The Item Details screen appears.
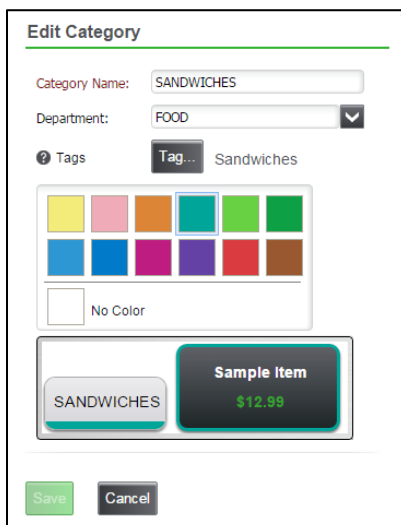
3. Under 'Tax and Pricing,' select the **variation** you want to tag and click **Tag**. The Tag dialog appears.

4. Select the **tags** to apply to the variation.

5. Click **Done**.

6. Click **Save**.

To assign a category to a tag:

1. In Silver Back Office, select **MENU > CATEGORIES & ITEMS**.

2. Click [✎] for the **category** to tag. The Edit Category dialog appears.
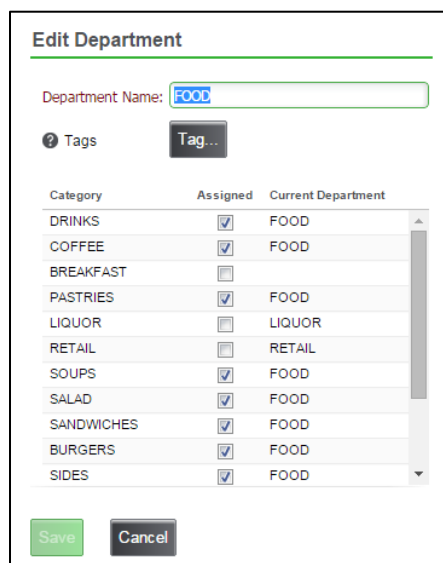
3. Click **Tag**. The Tag dialog appears.

4. Select the **tags** to apply to the category.

5. Click **Done**. The Edit Category dialog appears.

6. Click **Save**.

To assign a department to a tag:

1. In Silver Back Office, select **MENU > DEPARTMENTS**.

2. Click [✎] for the **department** to tag. The Edit Department dialog appears.

3. Click **Tag**. The Tag dialog appears.

4. Select the **tags** to apply to the department.

5. Click **Done**. The Edit Department dialog appears.

6. Click **Save**.

To remove a department, category, or item from a tag:
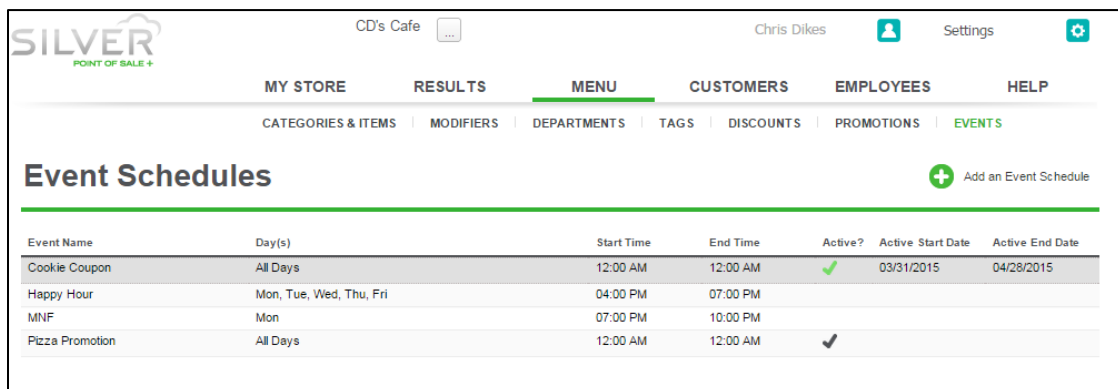
1. In Silver Back Office, select **MENU > TAGS**.

2. Select the **tag** you want to edit.

3. Under 'Matching tagged objects,' select the **object** you want to remove from the tag.

4. Click **Untag.**

5. Click **Save**.

To delete a tag:

1. In Silver Back Office, select **MENU > TAGS**.

2. Select the **tag** you want to delete.

3. Click **Remove Tag**. A warning prompt appears.

4. Click **OK**.

EVENTS
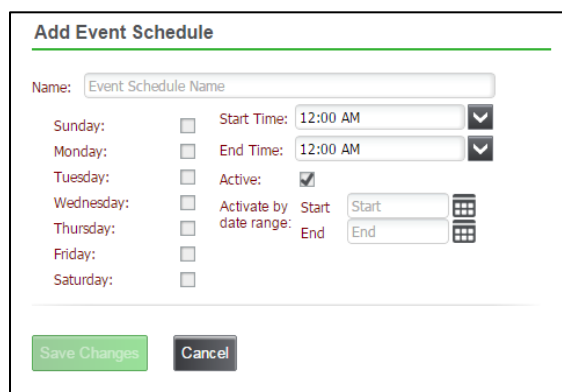
Use Events to establish special pricing for use during specific times of the day, such as Happy Hour, on a specific day of the week, such as every Sunday, or for a specific date range, such as the month of April. First, define when each event is to occur, and then access each of the items subject to the special pricing and designate which events apply to the item and at what price you wish to sell the item during the event time frame. For events enabled with a starting and ending date, the system places a green check mark in the corresponding active column, if the event is active. Active events without a starting and ending date have a black check mark under the corresponding active column.

ADDING AN EVENT

1. Select **MENU > EVENTS**.

2. Select **Add an Event Schedule**.

3. Type a **name** for the event.

4. Select the **days** for the event. Select all days if the event is to occur every day.

5. Select a **start time** and an **end time**. The system defaults to 12:00 AM to 12:00 AM.

6. Select **Active** to enable the event.

    -OR-

    Select the **start date** and **end date** to enable the event for a specific date range. When you enable the event according to date range, you cannot select Active as the event is activated by the date range.

7. Click **Save Changes**.

CUSTOMERS

NCR Silver Pro Restaurant enables you to compile customer information, create a loyalty program for your customers, use email messages to market to your customers, and link to social media pages, such as Facebook and Twitter.

EMAIL MARKETING

NCR Silver Pro Restaurant enables you to market to your customers using email messages. With easy to use templates, you can send coupons, receipts, and thank you email messages to customers. You can use this feature to let customers know about upcoming events, provide soft copies of receipts rather than printed copies, welcome new customers, and touch base with customers who haven't visited recently. Include special offers in these email messages to entice a return visit to your restaurant and to assist you in tracking the effectiveness of your email marketing campaign.
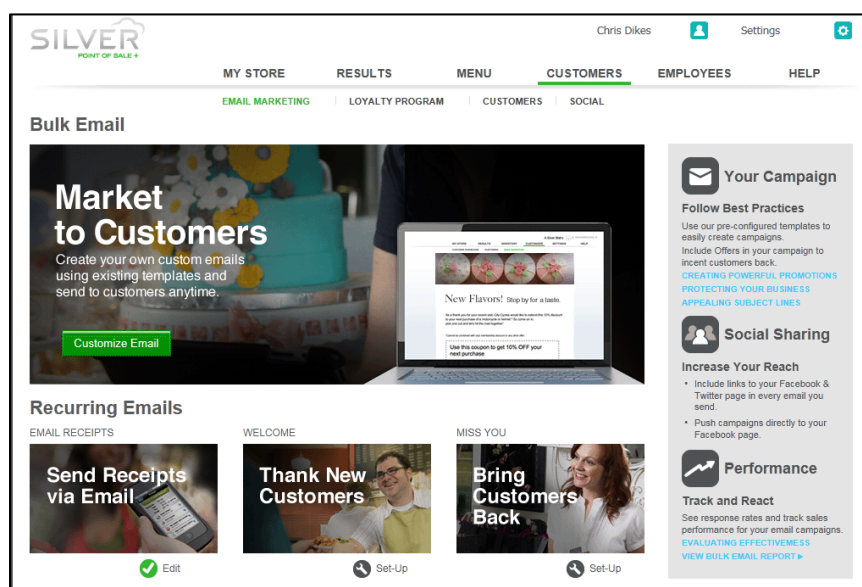
Market to Customers — Create a custom message to send to all customers, or to a select category of customers, letting them know about upcoming events and special menu offerings.

Customer Receipts as Email Messages — Create a custom receipt to send to customers, in lieu of a printed receipt, using an email message.

Welcome Email Messages — Create a custom email message to welcome new customers. The system automatically sends the message to a new customer as soon as you add their email address to your customer database.

Miss You Email Messages — Create a custom email message to send to customers who have not recently visited your restaurant. You establish the number of days between visits at which to send the message.

Email Tips and Tools — Access the tips and tools provided by NCR Silver Pro to assist you in creating powerful, appealing email messages, and to track the effectiveness of your email campaign. This includes templates, an email designer, social sharing links, and more.

ADDING A 'FROM EMAIL' ADDRESS

Prior to creating your email messages, confirm the email address from which to send your email messages. This email address appears on all email messages you send.

1. Select **Settings > Company Information**.

2. Under 'Email Marketing Information,' verify the **From Email address** is the one you want to use for email messages. If not, enter the **correct email address** and click **Save**.
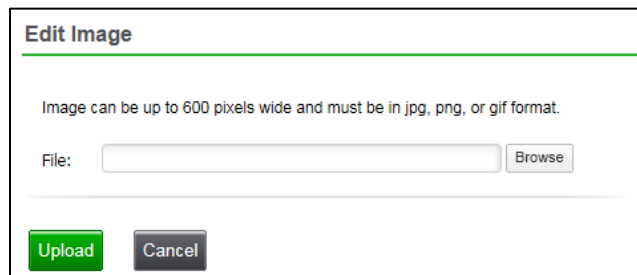
DESIGNING YOUR EMAIL MESSAGES

Each email message type uses a designer tool to assist you in creating the message. Although all types share basic similarity, each contains settings specific to that message type. This section guides you in the basics of designing an email message. Each email message type can contain up to three sections: image, text, and offer. If you do not configure a section, it does not appear in your email message.

The Receipt email message type only contains an image and offer section for you to design.

CREATING A MARKETING EMAIL MESSAGE

1. In Silver Back Office, select **CUSTOMERS > EMAIL MARKETING**.

2. Click the **email marketing message** you wish to create. You can select from Market to Customers, Send Receipts via Email, Thank New Customers (Welcome), and Bring Customers Back (Miss You).

3. Use the **default template**, or click **Start New Email** to choose another template for your email message.

    If you click **Start New Email**, the Select Template screen appears. Click the **template** you want to use and then click **Select**. The Change Template prompt appears with three options. Click **Discard** to discard the current email content, click **Copy** to copy the subject and text to the new email message, or click **Cancel** to return to the previous email template.

    If after selecting a new template, you wish to revert to the previous template, click **Discard Changes**.

4. Click **Click here to add image**. The Edit Image screen appears.

5. Click **Browse**. The Choose File to Upload screen appears.

6. Navigate to the **image file location**, select the **image file**, and click **Open**. The system returns to the Edit Image screen.

7. Click **Upload**. The system uploads your image to the email template. A Success prompt appears.

8. Click **OK**.
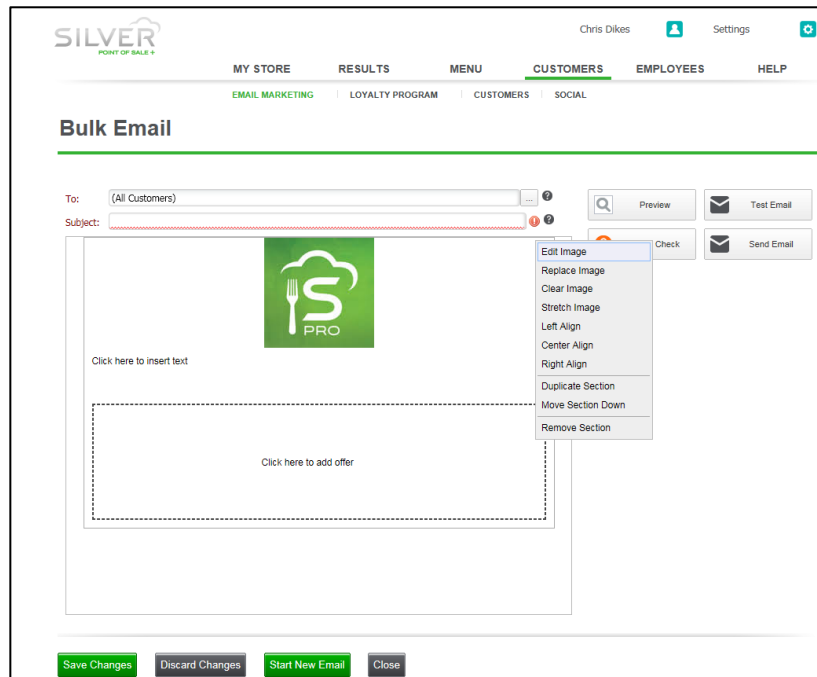
Hover over the image frame and click ⚙ in the top right corner to edit the image settings, the placement of the image within the message, or remove the image from the message.

9. Click **Click here to insert text**. The Edit Text screen appears.
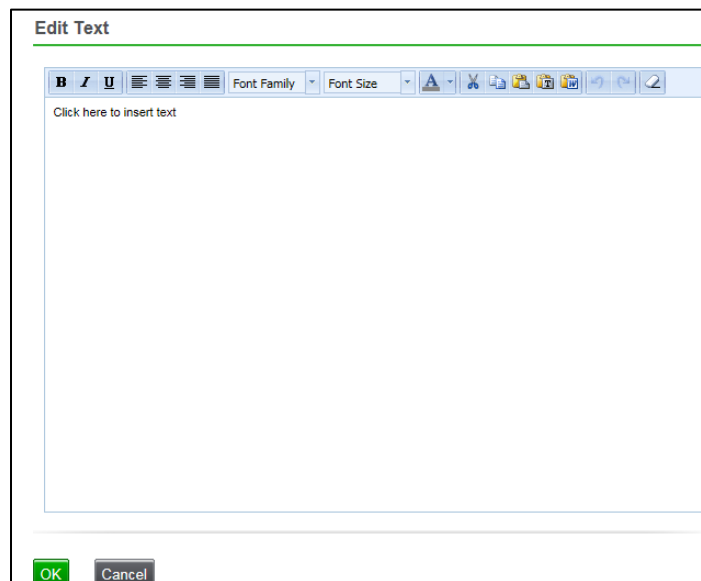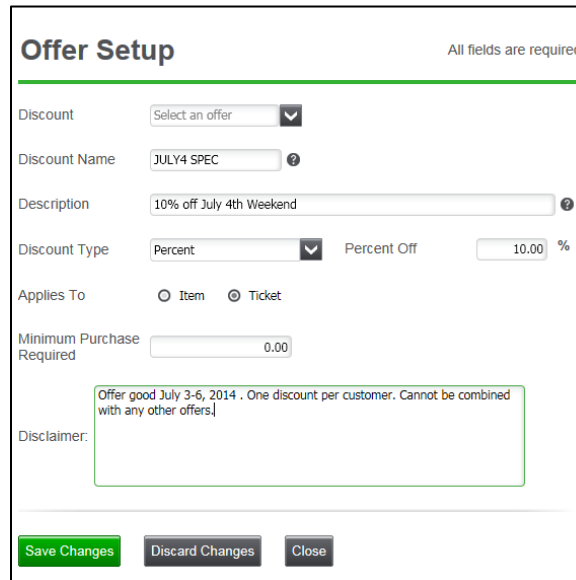
10. Type your email message and click OK.

    You can use the editing toolbar to adjust the font type and size, the layout of the text, and much more.

    Hover over the text frame and click ⚙ in the top right corner to return to the Edit Text screen, edit the placement of the text within the message, or remove the text from the message.

11. Click **Click here to add offer**. The Offer Setup screen appears.

12. Select an **existing discount** to use or select **ADD NEW** from the drop-down list.

   If you select ADD NEW, it is necessary to type a **name** for the discount offer. The name does not appear in the email message.

   If you use an existing discount offer, you will not be able to accurately track the redemptions from the email offer.

13. Type a **description** for the offer. The description appears in the email message.

14. Select a **discount type** from the drop-down list.

   If you select Amount or Percent, it is necessary to enter the percentage or amount of the discount.

15. Select either **Item** or **Ticket**, to specify the level at which to apply the discount.

16. Type the **minimum amount** required to apply the discount.

   Leave the amount as **$0.00**, if a minimum purchase amount is not required to apply the discount.

17. Accept the default disclaimer information, or type your own disclaimer information for the offer.

18. Click **Save Changes**. The system returns to the email designer.

   Hover over the offer frame and click ⚙ in the top right corner to return to the Offer Setup screen, edit the placement of the offer within the message, or remove the offer from the message.

19. Click **Save Changes**.

PREVIEWING YOUR EMAIL MESSAGE
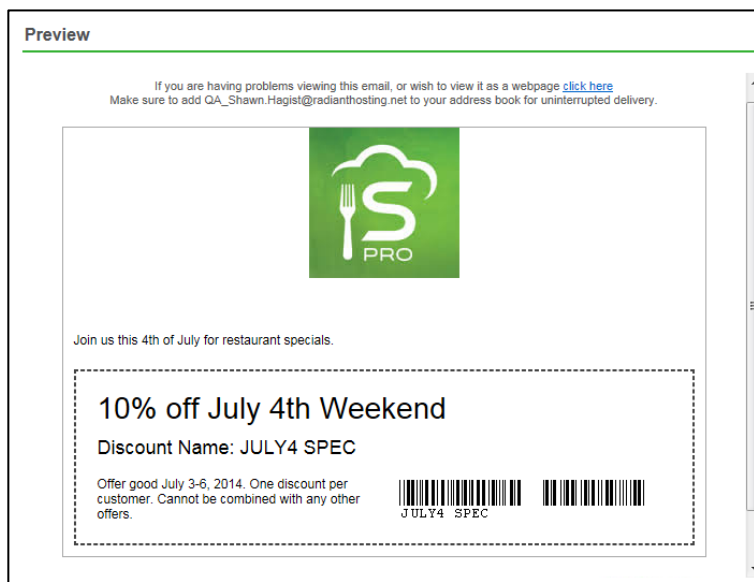
At any point during the creation of your message, click **Preview** to display your email message.

USING SPAM CHECK

NCR Silver Pro contains a utility that calculates the likelihood a spam checker may capture your email marketing message. Click **Spam Check** after creating your email message to determine which, if any, spam triggers exist in your email message.

If the spam check score is Low, you can proceed to send your email message.

If the spam check score is Medium, the utility identifies the triggers that could classify your email message as spam. You can proceed to sending your message; however, the chance exists that your customer may not receive your email message. Review your email message and modify where necessary.

If the spam check score is High, the utility identifies the triggers which classify your email message as spam. The system will not send your email message as long as the spam score remains High. Review the triggers identified by the utility, modify your email message, and run Spam Check again.

Tips to lower your Spam Check Score:

- Make sure your email message does not consist solely of images.
- Avoid the following words and phrases:
  - The word 'test' in the subject line.
  - "Dear _____,' in the subject line or in the introduction of the message.
  - 'Money back guarantee' anywhere in your email message.
- Do not use an excessive number of exclamation points, as in "!!!"
- Do not use all CAPITAL LETTERS.

SENDING A TEST EMAIL MESSAGE

Prior to sending your email message to your customers, you can send a test email message to a maximum of five email addresses. Use Test Email to verify the formatting of your email message on different email clients.
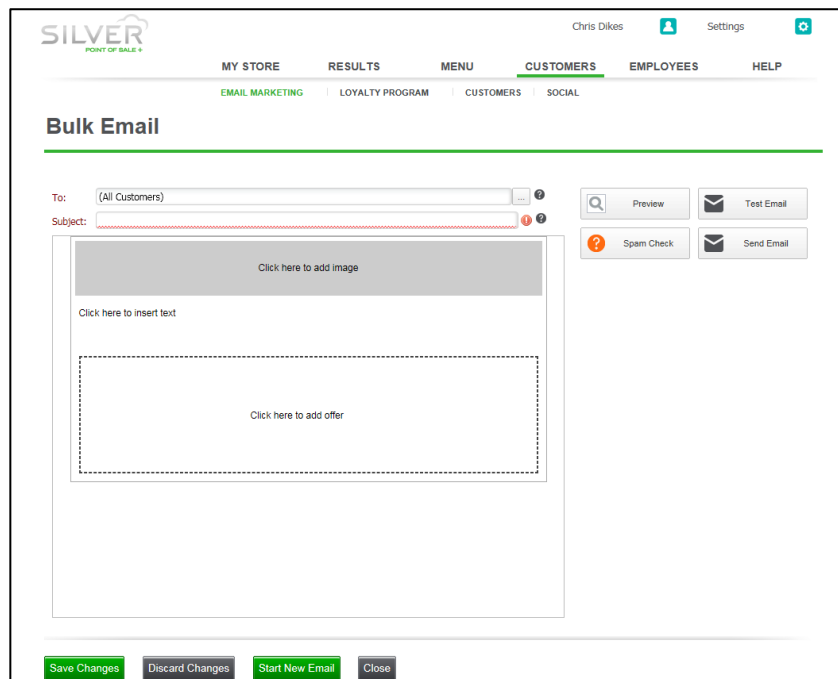
1. At the email designer, click **Test Email**. A Send Test Email screen appears.

2. Enter up to **five email addresses**, each separated by a comma.

3. Click **Send Test**. The Email Queued prompt appears.

4. Click **OK**. The system sends your email message.

WORKING WITH MARKET TO CUSTOMERS EMAIL MESSAGES

Use the Market to Customers email message type to send marketing email messages to a maximum of 2,500 of your customers. As part of the configuration, you can elect to send your email marketing message to all of customers, or to a specific customer category.

CONFIGURING YOUR BULK EMAIL MARKETING MESSAGES

1. At EMAIL MARKETING, under 'Bulk Email,' click **Market to Customers**.

2. Click 'To:' to select to whom you want to send your email marketing message. The Select Recipients screen appears.

---

3. Click the **customer category** to include in your email message, and click **OK**. You can select All Customers, No Customer Category Assigned, Preferred, Retail, and Wholesale.

   When you assign a customer to an order, you can classify a customer to one of three categories: Preferred, Retail, and Wholesale. You can also edit a customer record to assign a customer to a category in Silver Back Office at CUSTOMERS > CUSTOMERS.

4. Accept the **default subject line**, or type a **subject** line for your email message.

5. Design **your email message**. Refer to 'Designing Your Email Message.'

6. Click **Save Changes** and continue to the next procedure to send your email message.

   Remember to preview your email message, test your email message with spam check, and send a test email message.

SENDING YOUR BULK EMAIL MARKETING MESSAGES

Once you complete the design of the marketing email message and the selection of your recipients, you are ready to send your marketing message.

1. At the email designer, click **Send Email**. The Confirm Send screen appears.
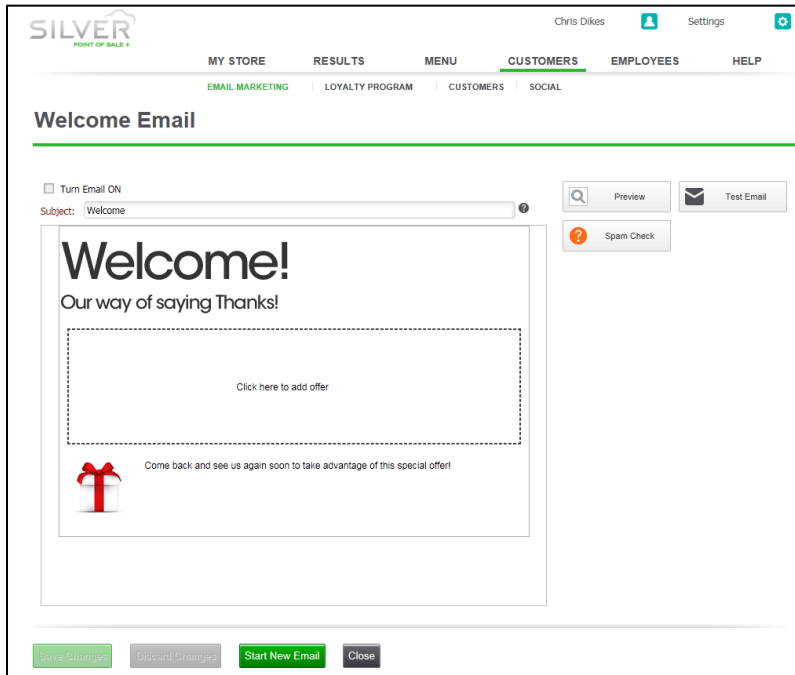
   If your email message contains a spam check score of Medium, a prompt appears with the option to not send the email message or to continue with sending the email message.

2. Click **Send**. The Email Queued prompt appears.

3. Click **OK**. The system sends your marketing message.

4. Click **Close** to exit EMAIL MARKETING.

WORKING WITH WELCOME EMAIL MESSAGES

Use the Welcome email message type to thank new customers for their patronage and to entice them to return by attaching an offer for them to use on their next visit. Once you activate the feature, the system automatically sends the Welcome email message when you add a new customer to your customer database.

1. At EMAIL MARKETING, under 'RECURRING EMAILS,' select **WELCOME**.
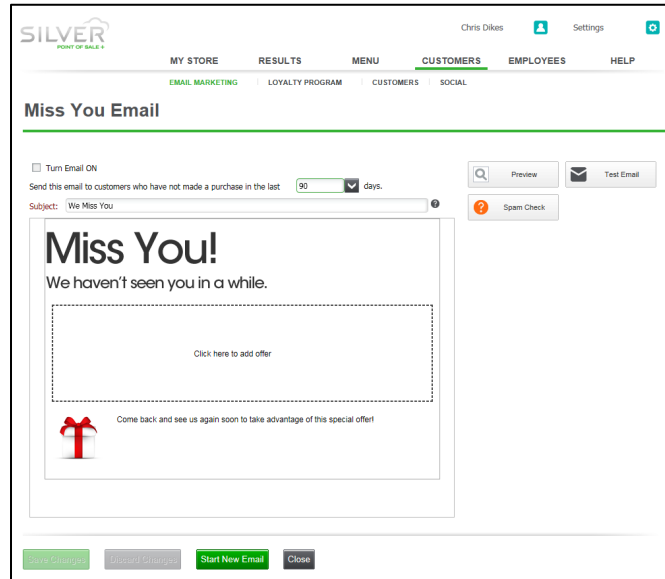
2. Accept the **default subject line**, or type a **subject line** for your email message.

3. Design **your email message**. Refer to 'Designing Your Email Message' for more information.

   Remember to preview your email message, test your email message with spam check, and send a test email message.

4. Click **Turn Email ON** once you are ready for the system to begin sending the Welcome email message to new customers.

5. Click **Save Changes**.

WORKING WITH MISS YOU EMAIL MESSAGES

Use the Miss You email message type to entice customers to return to your restaurant. You configure the number of days since a last visit for the system to send a Miss You email message to your customers.

1. At EMAIL MARKETING, under 'RECURRING EMAILS,' select **MISS YOU**.

2. Accept the **default subject line**, or type a **subject line** for your email message.

3. Select the **number of days** since the last visit by a customer at which to send the message. You can choose from 30, 60, 90, 120, 180, and 365 days.

4. Design **your email message**. Refer to 'Designing Your Email Message,' for more information.

    For Miss You email messages, consider including an offer to entice customers to visit your restaurant.

    Remember to preview your email message, test your email message with spam check, and send a test email message.

5. Click **Turn Email ON** once you are ready for the system to begin sending the Miss You email message to your customers.

6. Click **Save Changes**.

WORKING WITH SEND RECEIPTS VIA EMAIL
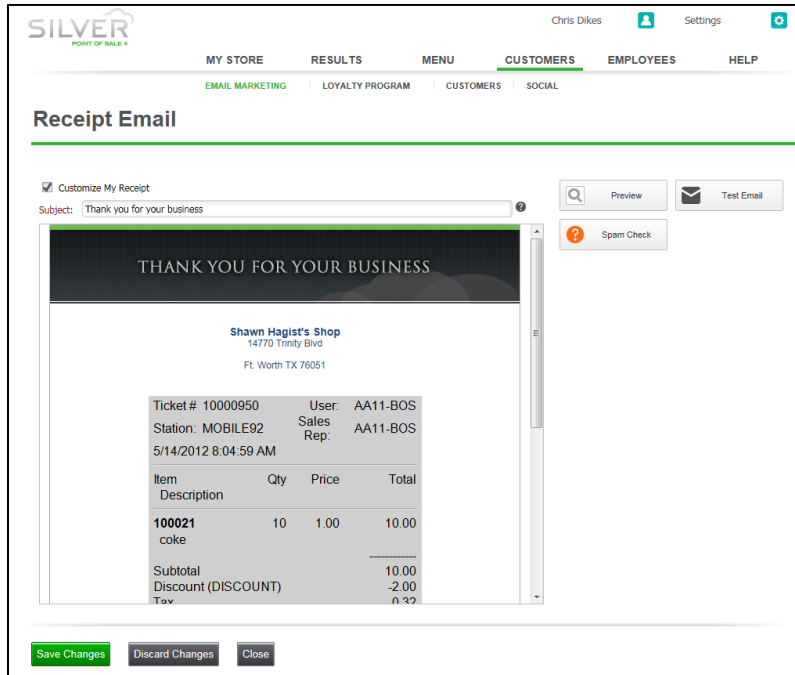
NCR Silver Pro provides you the option to send your customers their receipts as an email message. Use this feature to collect customer email addresses, to provide an added convenience to your customers, and to connect with your customers. You can add an image and an offer to your email receipts.

By default, the receipt email message displays the store information near the top of the receipt. The system uses the store information found in Settings > Store > Receipt Information.

The receipt email message displays the transaction details in the middle portion of the screen with a gray background. You cannot edit this information.

You can also display a message underneath the transaction details. Access Settings > Store > Receipt Information > Receipt message to edit the receipt message. This message appears on both printed and receipts sent through email.

1. At EMAIL MARKETING, under 'RECURRING EMAILS,' select **EMAIL RECEIPTS**.

2. Click **Customize My Receipt**.

3. Accept the **default subject line**, or type a **subject line** for your receipt email message.

4. Click [gear icon] in the top right corner of the image frame to add an image file to your email receipt. Refer to 'Designing Your Email Message' for more information on adding and editing images.

   By default, the system places the image above the store information.

5. At the bottom of the email message, click in the top right corner of the offer frame to add an offer to your email. Refer to 'Designing Your Email Message' for more information on adding and editing offers.

   By default, the system places the offer at the bottom of the email message.

   It is not necessary to remove the offer if you do not plan to include an offer in your email receipt message. The receipt email message only includes the offer if you configure an offer to include.

Remember to preview your email message, test your email message with spam check, and send a test email message.

6. Click Save Changes.

USING EMAIL TIPS AND TOOLS

NCR Silver Pro contains a number of email tips to assist you in creating a powerful and effective email marketing campaign. At CUSTOMERS > EMAIL MARKETING, you can find tips, such as 'Creating Powerful Promotions,' 'Appealing Subject Lines," and 'Evaluating Effectiveness.'

NCR Silver Pro also provides tools to help you track the success of your email messages.
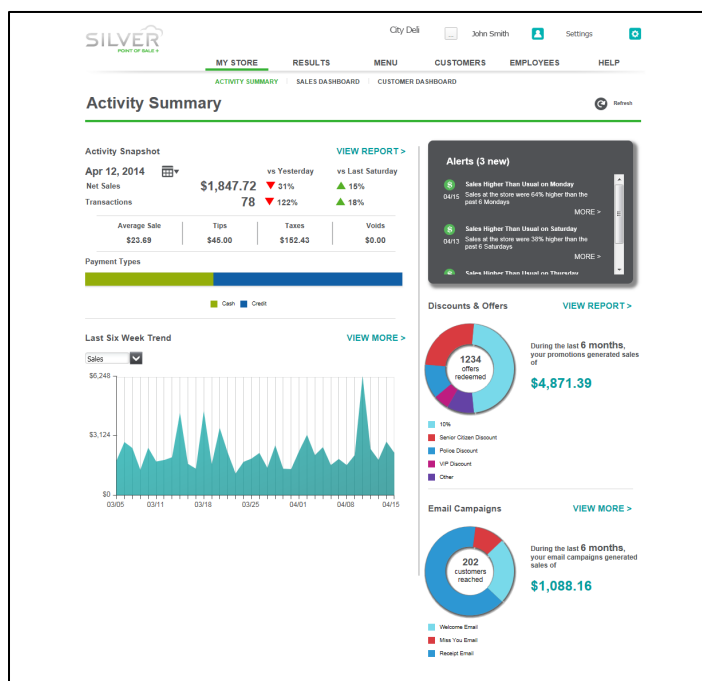
When you log in to Silver Back Office, the system directs you to the Activity Summary page. At the right side of the screen, the system provides you with a quick snapshot regarding the effectiveness of your Email Campaigns over the previous six months.
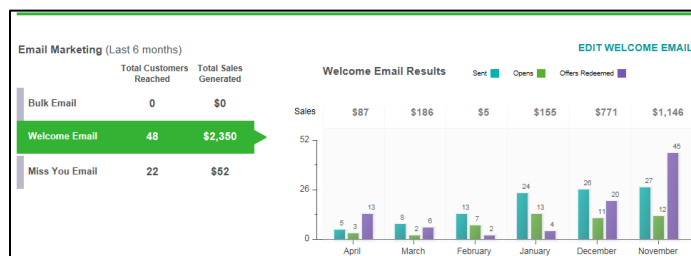
Click VIEW MORE to access the Customer Dashboard to see a graphical chart depicting the success of your email messages over the previous six months.

In addition to these snapshots, you can access specific reports, and configure a time period for which to evaluate the success of your email marketing messages.

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 built-in loyalty program, or a third-party loyalty program via API.

Choose the loyalty program that best meets your needs. The following options are available:

- Punches (Silver Built In Loyalty_

- Points (Silver Built in Loyalty)

- Paytronix Loyalty API (Requires a loyalty account with Paytronix)

- Silver Generic Loyalty API (Supported providers include Punchh.)

UNDERSTANDING THE DIFFERENCES BETWEEN THE LOYALTY PROGRAMS:

Silver Built-In Loyalty Program

With the built-in loyalty program, you select the method by which your customers earn rewards, either punches (number of visits) or points (number of dollars spent), and you define the rewards your customers can earn. NCR Silver Pro Restaurant automatically enrolls every customer and tracks customer sales by the customer record. Because the loyalty program keys off the customer record, you do not need for cards or other devices.

NCR Silver Pro Restaurant offers you the following options for the built-in loyalty program:

- Punches

  A customer accumulates a reward with each visit to your restaurant.

- Points

  A customer accumulates a reward based on each dollar spent in your restaurant. One dollar spent corresponds to one point.

When a customer meets the defined threshold for either punches or points, they earn a reward, either a specific amount or percentage discount, which you define, to use on their next visit. The system then resets the loyalty value to zero, and the customer begins accumulating more punches or points toward their next reward.

Silver Generic Loyalty API and Paytronix Loyalty API

With a third-party loyalty program, the Silver host communicates with the loyalty provider host using the an API Interface. You assign the ticket to a customer by phone number, barcode, QR code, or mag card. When the customer earns a loyalty reward, the loyalty provider may send a notification to the POS app, or they may send a coupon to the customer for the customer to redeem the reward.

Refer to the loyalty provider for details on the available options for the loyalty program.

Using a third-party loyalty program with NCR Silver Pro Restaurant requires an Internet connection. If you operate without an Internet connection, the POS app stores the customer purchase information, and submits it when you return to a connected state; however, without an Internet connection, the POS app cannot receive notifications of earned rewards by the customer.

WORKING WITH THE SILVER BUILT-IN LOYALTY PROGRAM

You can quickly configure the Silver Built-In Loyalty program for use with your restaurant. You manage and monitor your loyalty program in Silver Back Office.
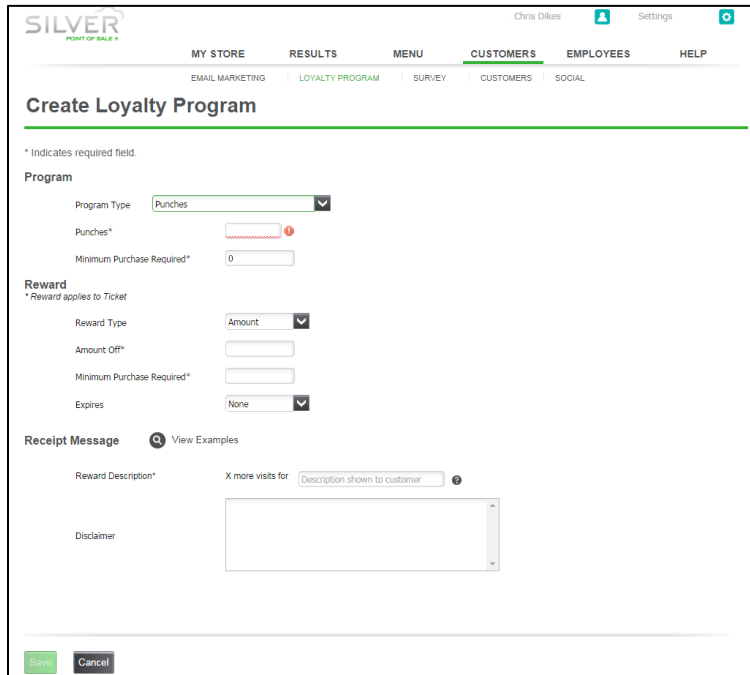
CONFIGURING THE SILVER BUILT-IN LOYALTY PROGRAM

With the Silver built-in loyalty program, determine how to you want customers to earn rewards, either by punches or points, before proceeding to configure your program.

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

2. Select **CUSTOMERS > LOYALTY PROGRAM**. The loyalty program setup screen appears.
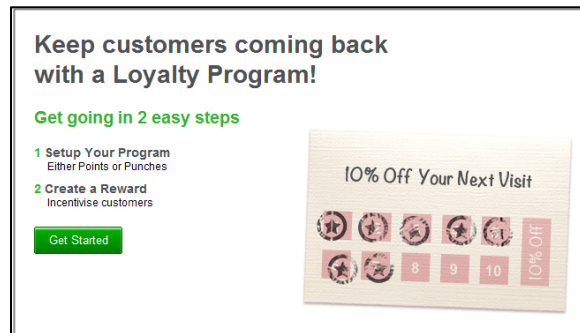
3. Click **Get Started**. The Create Loyalty Program screen appears.

4. Under 'Program,' select **punches or points** from the 'Program Type' drop-down list.

5. Type the **number** of punches or points a customer must accumulate before receiving a reward.

6. If you select Punches as your loyalty program type, you must type a **minimum purchase required** to earn a punch. This number can be '0.'

7. Under 'Reward,' select a **reward type** from the drop-down list. Select Amount, to provide a dollar amount discount to the guest check total, or select Percentage, to provide a percentage discount to the guest check total.

8. Type the **amount** of the reward discount.

For example, if you select Amount as your reward type and type '2' as the amount, the customer receives $2.00 off the guest check as their reward.

If you select Percentage as your reward type and type '10' as the amount, the customer receives a ten percent discount on the guest check as their reward.

9. Type the **minimum purchase required** to earn the reward.

10. Select an **expiration deadline** for the reward from the drop-down list. You can select None, 30 Days, 60 Days, 90 Days, 6 Months, or 12 Months.

11. Under 'Receipt Message,' type the **reward description** to appear on the customer receipt. The message defaults to the Amount Off value and 'x' represents the actual values recorded in the system by the customer.

    For example, if you provide a reward of $2.00 off after five visits, and a customer makes their third visit to your restaurant, the system displays the following message on the customer receipt '2 more visits for $2 off.'

    Click **View Examples** next to 'Receipt Message' to see examples of emailed and printed receipts with the reward description.

12. Type the desired disclaimer.

    If you selected a time period for the reward expiration, the system automatically adds an expiration disclaimer. You can add an additional disclaimer. If you add disclaimer information, make sure to publish the program rules somewhere else, such as on your Web site.

    Consider adding the following disclaimer information:

    You cannot use rewards cannot with any other discounts.

    You can change your rewards or discontinue the loyalty program at any time.

13. Click **Save**. The Loyalty Program screen appears.

MANAGING YOUR BUILT-IN LOYALTY PROGRAM

You can edit your built-in loyalty program to best meet the needs of your restaurant. You can edit the program details, deactivate the program, and reactivate the program.

EDITING YOUR BUILT-IN LOYALTY PROGRAM DETAILS

Use caution when editing your program details.

1. Access **CUSTOMERS > LOYALTY PROGRAM**.

2. Click **Edit**. The Create Loyalty Program screen appears.

3. Make the **necessary changes**.

4. Click **Save**.

DEACTIVATING YOUR BUILT-IN LOYALTY PROGRAM

At any time, you can deactivate your built-in loyalty program.

1. Access **CUSTOMERS > LOYALTY PROGRAM**.

2. Click **OFF.** The Turn Off Loyalty Program prompt appears.

3. Click **OK**. The system deactivates your loyalty program.

REACTIVATING YOUR SILVER BUILT-IN LOYALTY PROGRAM

When you reactivate the Silver Built-In Loyalty program, you must re-enter the program details. Prior to clicking ON, select View, and note the details of your deactivated Silver Built-In Loyalty program.

1. Access **CUSTOMERS > LOYALTY PROGRAM**.

2. Click **ON**.

3. Enter the **program details** for your loyalty program.

    If you are unsure of your program details, click Cancel to return to the Loyalty screen, click View, and note your program details.

4. Click **Save**.

MONITORING YOUR BUILT-IN LOYALTY PROGRAM

You can monitor the Silver Built-In Loyalty program in Silver Back Office. In Silver Back Office, select **CUSTOMERS > LOYALTY PROGRAM** to monitor and track your loyalty program. Under 'Earned Rewards,' you can view the rewards earned, the redemption rate, and the rewards earned but not redeemed. Use the 'From' and 'To' date options to change the time period you want to monitor.
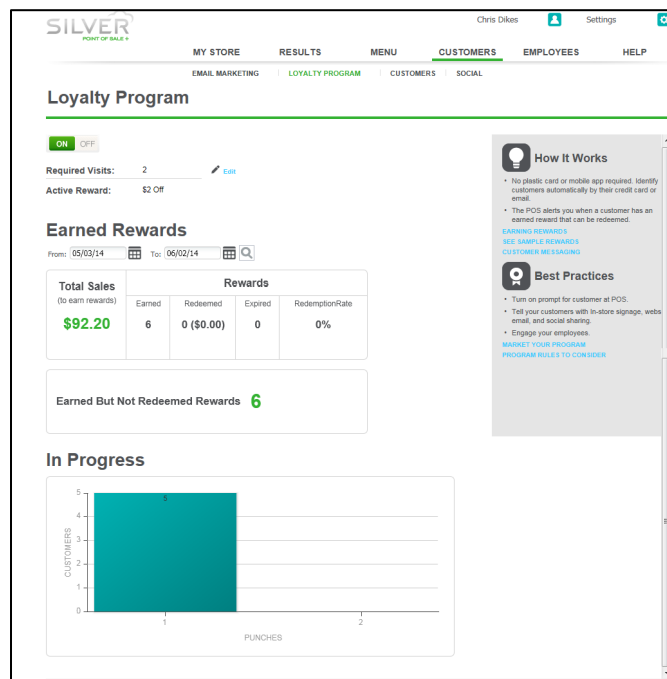
MANUALLY ADDING LOYALTY

If needed, you can manually add loyalty amounts. To do this:
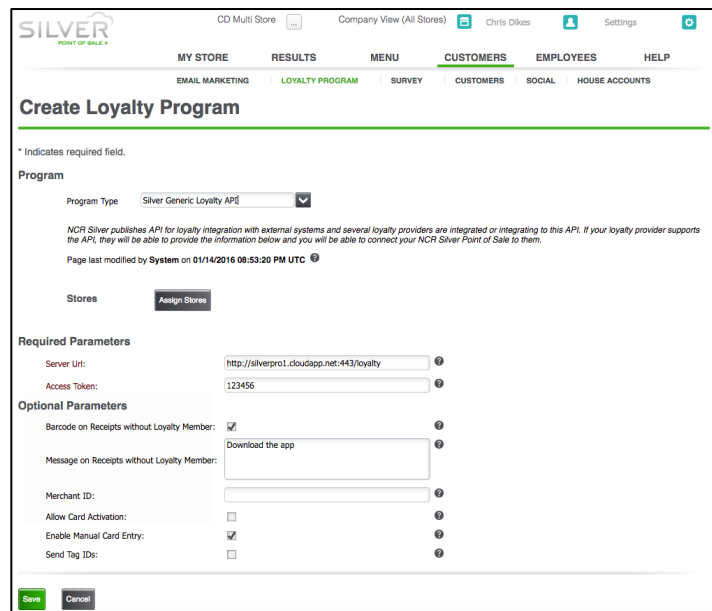
1. Access **CUSTOMERS > CUSTOMERS**

2. Click the customer name you wish to add loyalty to, a pop up window will appear.

3. Click the **Loyalty Program** tab.

4. Click **Add Punches/Points**, enter the amount and click save.

Loyalty balances can also be entered as part of the customer list import.

CONFIGURING YOUR LOYALTY PROGRAM TO USE SILVER GENERIC LOYALTY API

To configure a third-party loyalty program for use with NCR Silver Pro Restaurant, you need two pieces of information: the server URL of the loyalty provider and your access token. Your loyalty program provider supplies you with this information. You can also add a barcode and a message to appear on the receipts of those customers who are not part of your loyalty program to encourage them to join.

1. Select **CUSTOMERS > LOYALTY PROGRAM**.

2. Click **Get Started**. The Create Loyalty Program screen appears.

3. Under 'Program,' select **Silver Generic Loyalty API** from the 'Program Type' drop-down list.

4. (Multi-Site Only) Click **Assign Stores** and select the **stores** you want to use the third-party loyalty program. Stores not assigned to third-party loyalty will not have a loyalty program.

5. Under 'Required Parameters,' type the **server URL** provided by your loyalty provider.

6. Enter the **access token** provided by your loyalty provider.

7. (Optional) Under 'Optional Parameters,' select **Barcode on Receipts without Loyalty Member** to print a barcode on the receipt of a customer who does not belong to your loyalty program. A Customer can join, usually by downloading an app from your loyalty program provider, and scan the barcode in to the app to have the transaction count toward their loyalty rewards.

8. (Optional) Type a **message** to appear on the receipt of customers who do not belong to your loyalty program.

9. (Optional) Type the **merchant ID**. You will only need to enter a merchant ID if your Silver Pro merchant ID differs from your loyalty host merchant ID. Otherwise, leave this field blank.

10. (Optional) Select **allow card activation**, if your loyalty provider allows for loyalty card activation at the POS.

11. (Optional) Select **enable manual card entry**, if allowed by your loyalty provider, to allow employees to manually
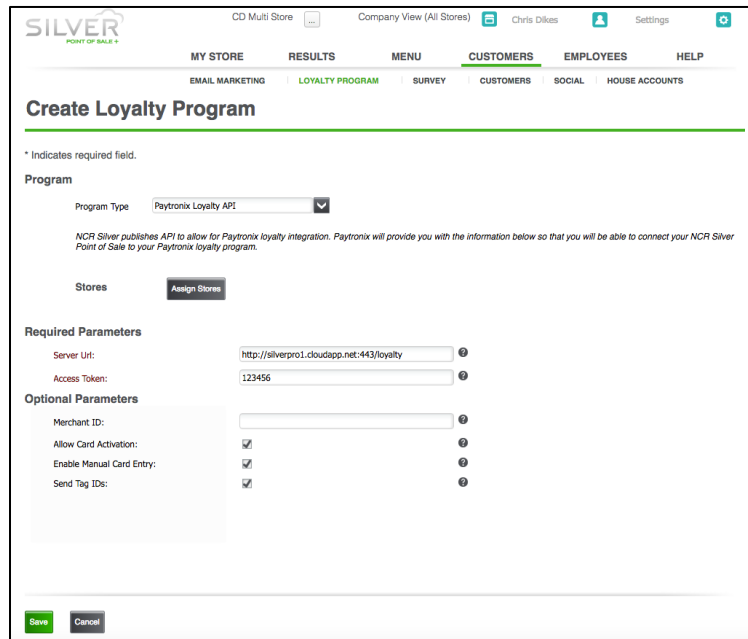
enter the loyalty card number of a customer.

12. (Optional) Select **Send Tag IDs** to send the tag ID of the items on the ticket to the loyalty provider. Only select this option if you have been advised to do so by your loyalty provider.

13. Click **Save**.

CONFIGURING YOUR LOYALTY PROGRAM TO USE PAYTRONIX LOYALTY API

To configure your Paytronix loyalty program for use with NCR Silver Pro Restaurant, you need the Server URL and the access token. Additionally, you will need to know if a merchant ID is required and whether you can activate cards at the POS and enter loyalty cards manually.

1. Select **CUSTOMERS > LOYALTY PROGRAM**.

2. Click **Get Started**. The Create Loyalty Program screen appears.

3. Under 'Program,' select **Paytronix Loyalty API** from the 'Program Type' drop-down list.

4. (Multi-Site Only) Click **Assign Stores** and select the **stores** you want to use the third-party loyalty program. Stores not assigned to third-party loyalty will not have a loyalty program.

5. Under 'Required Parameters,' type the **server URL** provided by your loyalty provider.

6. Enter the **access token** provided by your loyalty provider.

7. (Optional) Type the **merchant ID**. You will only need to enter a merchant ID if your Silver Pro merchant ID differs from your loyalty host merchant ID. Otherwise, leave this field blank.

8. Select **Allow Card Activation** to enable employees to activate new loyalty accounts at the POS.

9. Select **Enable Manual Card Entry** to allow employees to manually enter loyalty card numbers.

10. (Optional) Select **Send Tag IDs** to send the tag ID of the items on the ticket to the loyalty provider. Only select this option if you have been advised to do so by your loyalty provider.

11. Click **Save**.

MANAGING SILVER GENERIC LOYALTY API PROGRAM OR PAYTRONIX LOYALTY API PROGRAM

To change the terms of your third-party loyalty program or to monitor the progress of your loyalty program, contact your third-party loyalty provider. If necessary, you can change the third-party settings in Silver Back Office.

EDITING THE THIRD-PARTY LOYALTY PROGRAM SETTINGS

Use caution when editing the Silver Generic Loyalty API settings as these can affect the ability of NCR Silver Pro Restaurant Edition to communicate with your loyalty provider. In most instances, you will not need to edit these settings.

1. Access **CUSTOMERS > LOYALTY PROGRAMS**.

2. Click **View**.

3. Make the **necessary changes**.

4. Click **Save**.

SURVEY
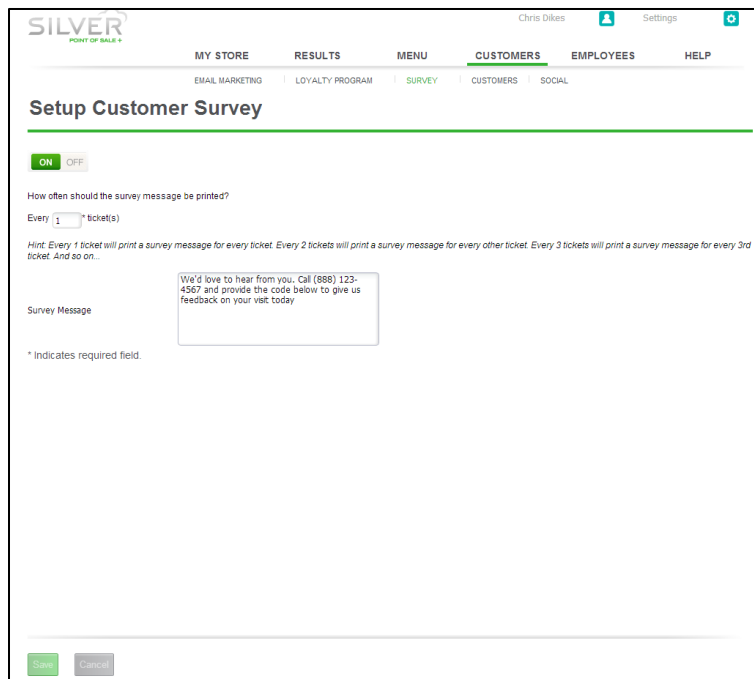
NCR Silver™ Pro Restaurant enables you to gather feedback about your restaurant from your customers through a survey. Using the Survey Interface, you can add a survey message to the bottom of guest receipts with instructions on how to contact the survey company. The guest receipt also includes a twenty-digit survey code to identify the store, ticket number, date, and time of the transaction. The survey message and code appear under the transaction information and above the store receipt message. In addition to specifying the survey message text, you can configure the frequency with which the system prints survey information on guest receipts.

You can partner with NCR Customer Voice or an outside company, such as SMG.

CONFIGURING THE CUSTOMER SURVEY

You configure the frequency with which the survey appears on guest receipts and the survey message text to appear on guest receipts.

1. In Silver Back Office, select **CUSTOMERS > SURVEY**.

2. Click **Get Started** to configure the survey interface.

3. Enter the **number** to specify the frequency with which the survey message and code appear on guest receipts. For example, enter '1' to print a survey message on every ticket, enter '2' to print a survey message on ever other ticket, and enter '3' to print a survey message on every third ticket.

4. Type the **survey message text** to appear on guest receipts. Make sure to include the phone number for the customer to call for the survey and any other additional information.

5. Click **Save**.

TURNING OFF THE CUSTOMER SURVEY

You may decide to deactivate the survey message and code for a period of time. You can do so without deleting your survey settings.

1. Select **CUSTOMERS > SURVEY**.

2. Click **OFF** to deactivate the customer survey message and code. A Turn Off Survey Program prompt appears.

3. Click **OK**.

    To reactivate the survey feature, access **CUSTOMERS > SURVEY** and click **ON**.

CHANGING THE CUSTOMER SURVEY SETTINGS

You can change the frequency of the customer survey message and code, and the text of the survey message.

1. Select **CUSTOMERS > SURVEY**.

2. Optionally, change the **number** specifying the frequency with which the survey message and code appear on guest receipts.

3. Optionally, change the **survey message text** to appear on guest receipts.

4. Click **Save**. A **Confirm Survey Program Changes** prompt appears.

5. Click **OK**.

USING THE CUSTOMER SURVEY

Once you configure the customer survey, NCR Silver Pro Restaurant automatically begins printing the customer survey on guest receipts.
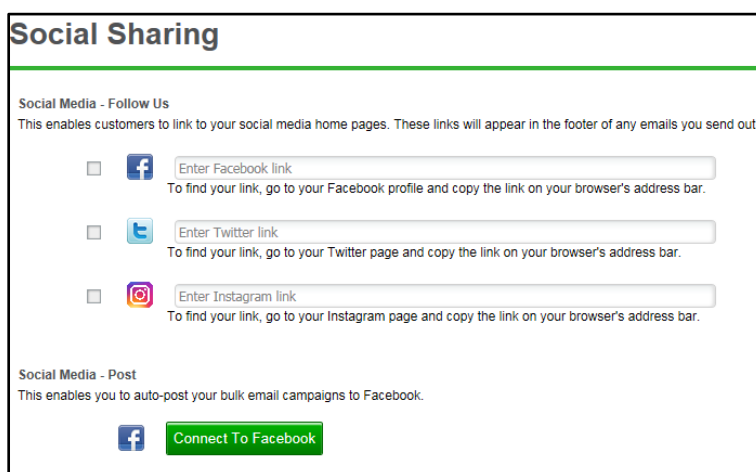
```
Shawn Hagist's Shop
        14770 Trinity Blvd
        Ft. Worth, TX 76051
          (817) 785-1687
Ticket #17000005        User: Chris D
8/25/14, 11:43:49 AM CDT
--------------------------------------
Item              Qty  Price    Total
--------------------------------------
Breakfast Burrito   1   4.99     4.99
Chai Latte          1   3.95     3.95
                              -----------
Subtotal                         8.94
Tax                              0.74
                              -----------
Total                            9.68
                              ===========
Tender:
CASH                             9.68
--------------------------------------
We'd love to hear from you. Call (888)
123-4567 and provide the code below to
give us feedback on your visit today!

            Survey Code:
        010 008 000 050 217 051 70

Thank you for visiting our restaurant. We
look forward to seeing you again!
```

CUSTOMERS

Under the Customers menu, you can create a customer list, add a customer, and import customers. You can capture the name, email address, phone, and address information of a customer at the time of a sale, identify any customers who have opted out of your marketing, and you can capture any notes about your customers to assist your employees. You also have the capability to divide customers into separate categories. Access customers at CUSTOMERS > CUSTOMERS.

SOCIAL SHARING

Social Sharing enables you to add your social media pages, such as Facebook, Instagram and Twitter, to any email messages you send to clients and to post your marketing email messages to your Facebook page. Access social sharing at CUSTOMERS > SOCIAL.

To include links to your social media sites in the footer of your email messages:

1. Select **Customers > Social**.

2. Under 'Social Media—Follow Us,' click the **Facebook box** and enter the **link** for your restaurant Facebook page.

3. Click the **Twitter box** and enter the **link** for your restaurant Twitter page.

4. Click the **Instagram box** and enter the link to your restaurant Instagram page.

5. Click **Save.**

To auto-post your bulk emails to your Facebook page:

1. Select **Customers > Social**.

2. Under 'Social Media—Post,' click **Connect to Facebook**. The system opens Facebook in a new Web browser.

3. Click **Okay** at each prompt to authorize NCR Silver with your Facebook account. After the last Facebook prompt, the new Web browser closes, and returns you to Silver Back Office.

   It may be necessary for you to log in to your Facebook account before you can authorize NCR Silver to post your email messages to your Facebook page.

4. At the Connect to Facebook prompt, click **Continue**.

5. Confirm the Facebook page to which you want NCR Silver Pro to post, and click **Continue**.

6. Click **Save** and exit the **Social** function.

HOUSE ACCOUNTS

In v3.11, NCR Silver Pro Restaurant introduces house accounts, which enables merchants to charge established clients on the date of sale, but bill them at a later date. Scenarios in which you may consider using house accounts include catering customers, delivery services, hotel room charges, manager comps, and forward day charges among others. Additionally, you can create a statement for House Accounts and export it to multiple formats for sending to customers.

With House Accounts, NCR Silver Pro Restaurant adds additional access levels. Make sure to review your user roles and ensure they have the proper assignments for house accounts.

When setting up house accounts:

- You establish house accounts in Silver Back Office before you can use them at the POS.
- You must link a customer with a house account. You may also link additional customers to a single house account.
  - For example, at ABC Company, Sarah Smith and Tim Jones are authorized to charge food on behalf of ABC Company at CD's Café. Sarah is the bookkeeper and is responsible for paying the account monthly. Thus, she is the house account owner. Tim is linked to the account as a customer, making him eligible to charge food as well. When either Sarah or Tim walk into CD's Café, the cashier will look up Sarah or Tim at the POS in order to link the house account to the order.
- You create house accounts at the store level.
- You define the maximum credit limit for a house account, up to $99,999.00
- You may disable a house account without deleting it.
- Once you create your first house account, a house account tender appears on the POS.

In Silver Back Office, you can perform the following functions related to house accounts:

- You can enter account activity, such as credits, debits, and payments received.
- You can create statements, which can be exported into a variety of formats and sent to customers.
- You can view two new reports, House Accounts and House Accounts Activity.

At the POS, you can perform the following functions with house accounts:

- You can charge a guest check to a house account.
- You search for a house account by searching for a linked customer record.
- You can accept payment for an outstanding balance through the use of a house account charge.

NOTE: Without an Internet connection, you cannot charge a guest check to a house account or accept payment for a house account at the POS.
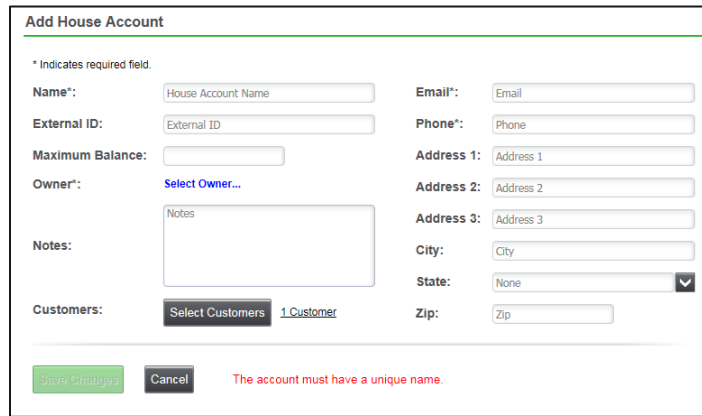
ADDING A HOUSE ACCOUNT

You can only add house accounts in Silver Back Office and they must be lined to a customer record. When you create a house account, you can link additional customers to the house account.

In multi-site environments, house accounts must be added at the store level.

1. In Silver Back Office, select **CUSTOMERS > HOUSE ACCOUNTS**.

---

2. Select **Add a House Account**. The Add House Account dialog appears.

3. Type a **name** for the house account.

4. (Optional) Enter an **external ID** for the house account. For example, if you already have an existing account number you want to use, enter that number here.

5. Enter the **maximum balance** for the house account.

6. Click **Select owner** to select an owner for the house account. A Select House Account Owner dialog appears. A house account must have an owner linked to it. Select the **owner** and tap **Done**.

7. (Optional) Add **notes** for the house account.

8. (Optional) Click **Select customer** to identify additional customers who can use the house account.

9. (Optional) Click "*X* Customer" button to view which customers are currently associated with the house account.

10. Enter the following information for the house account if you do not want to use the owner information or if the owner information did not include the following:

    - Enter the **email address** to associate with the house account.

    - Enter the **phone number** to associate with the house account.

    - Enter the **address, city, state**, and **zip** for the house account. This information appears on the statements you generate.

11. Click **Save Changes**.

ADDING A HOUSE ACCOUNT TRANSACTION

When you close a ticket associated with a house account at the POS, the information appears on the history for the house account. In Silver Back Office, you can also add transactions to the house account.

You can add the following transactions: Debit, Credit, and Payment.

1. In Silver Back Office, select **CUSTOMERS > HOUSE ACCOUNTS**.

2. Select the **house account**.

3. Select **Add Transaction**. The Add Transaction dialog appears.
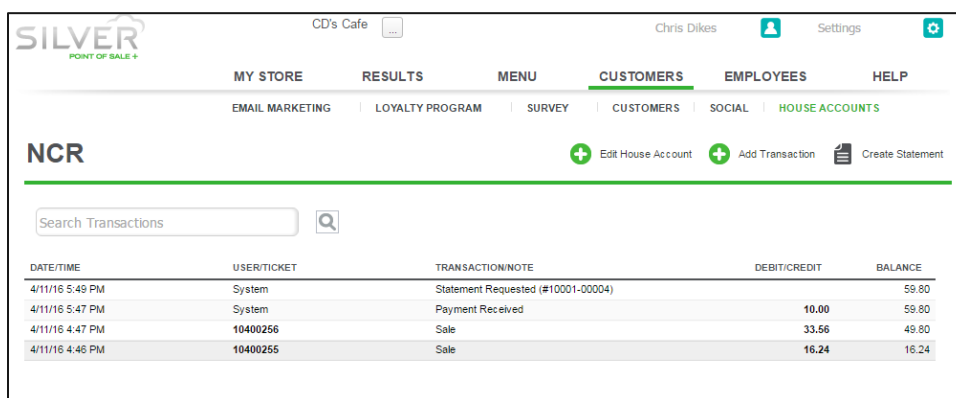
4. Select the **transaction type**: Debit, Credit, or Payment.

5. Enter the **transaction amount**.

6. Enter a **note** for the transaction, such as the reason for the debit or credit or information about the payment, such as the check number.

7. Click **Save Changes**.

VIEWING HOUSE ACCOUNT ACTIVITY

You can view house account activity in Silver Back Office. The activity view includes POS transactions, any transactions entered in Silver Back Office (debits, credit, and payments), and statement creations.

To view details of the transaction at the POS, click on the specific transaction and the system takes you to the POS Transactions screen where you can view the details of the transaction.

1. In Silver Back Office, select **CUSTOMERS > HOUSE ACCOUNTS**.

2. Select the **house account**. The activity view appears.

3. Select **HOUSE ACCOUNTS** to return to a list of all house accounts.

CREATING A STATEMENT FOR A HOUSE ACCOUNT

In Silver Back Office, you can create a statement to provide to your house account customers. The statement includes all house account activity. You can print the statement or export it to a variety of formats.

1. In Silver Back Office, select **CUSTOMERS > HOUSE ACCOUNTS**.

2. Select the **house account** for which you want to create a statement.

3. Select **Create Statement**. The Create Statement dialog appears.
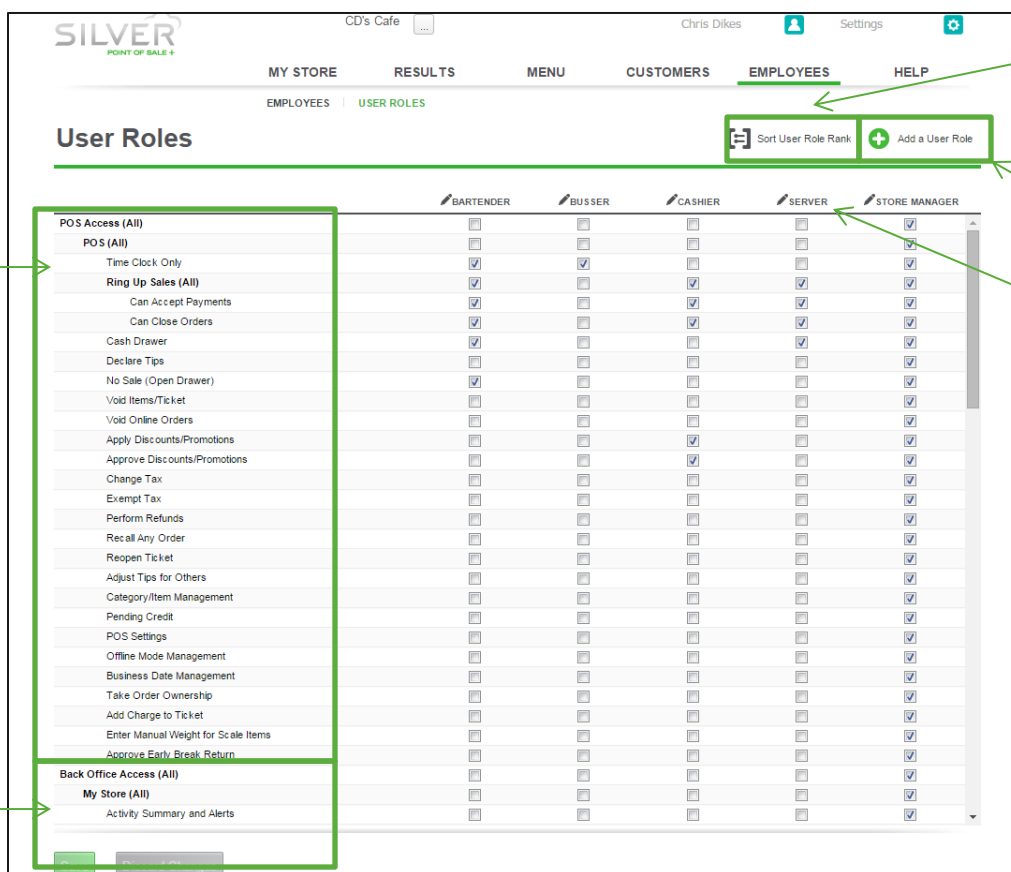
4. Select the **date range** for the statement. A preview of the statement appears.

5. Click **Save Changes**. A statement creation line item appears in the activity view. Click Cancel if you do not want to create a statement.

EMPLOYEES

The Employees menu enables you to create and manage user roles and add and manage your employees.

NCR Silver™ Pro Restaurant enables you to create user roles that define the access available to each employee in both Silver Back Office and the POS app. The size, layout, and policies of an operation, as well as the number of employees, determine the user roles you need to create and the access you need to assign to each user role.

POS Access

Back Office access.

Click to sort user role rank.

Click to add a user role.

Existing user roles.

MANAGING USER ROLES

NCR Silver Pro Restaurant provides three default user roles; however, you can add additional user roles and remove the default user roles, with the exception of Account Manager. You then assign the appropriate level of access to each user role and assign one or more user roles to each employee. Additionally, you can rank the user roles that access Silver Back Office. This prevents an employee with a lower ranked user role from changing their user role to one with a higher ranking. At the USER ROLES screen, user roles appear in order of ranking from lowest to highest, from left to right.
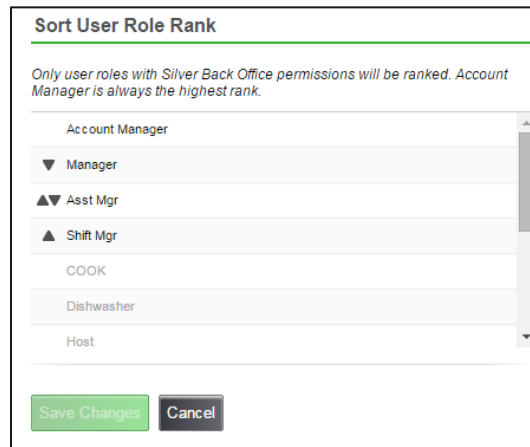
To create a new user role:

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

2. Select **EMPLOYEES > USER ROLES**.

3. Click **Add a User Role**. The Add User Role prompt appears.

4. Type a **name** for the user role, such as Bartender or Server.

5. Type a **standard pay rate** for the user role. The pay rate you specify here becomes the default payment rate for the user role; however, you can override the standard payment rate for an employee at the EMPLOYEE screen.

6. (Optional) Check box to exclude from labor reporting calculations. This feature allows salaried user roles to clock into the POS without impacting labor calculations.

7. Click **Save Changes** to return to the User Roles screen.

To rank user roles:

1.   Select **EMPLOYEES > USER ROLES**.

2.   Click **Sort User Role Rank**.

3.   Click ▲ to increase the rank of a user role or click ▼ to decrease the rank of a user role. You can only rank the user roles that access Silver Back Office.

4.   Click **Save Changes**.

To assign the appropriate access to each user role:

1.   At the User Roles screen, for each user role listed across the top of the screen, select the appropriate access from the options available on the left of the screen. The first section from which you make selections controls access to the POS app, and the lower section controls access to Silver Back Office.

2.   Click **Save** and exit the **User Roles** function.

UNDERSTANDING THE ACCOUNT MANAGER USER ROLE

The Account Manager user role automatically has complete access to everything in Silver Back Office, and this user role is necessary for registering hardware, accessing devices, and for viewing your bill. The system assigns the Account Manager user role to the individual who signs up for the account; however, you can re-assign the Account Manager user role to another individual, as well as assign this user role to multiple individuals. This user role is a Silver Back Office user role only; it is necessary to also assign each individual with the Account Manager user role another user role that provides access to the POS app.

UNDERSTANDING LEVELS OF ACCESS TO THE POS

It is necessary to assign appropriate access to user roles for employees to perform their job in the POS app. Every employee has access to the POS app for time clock functions. For employees, such as a cook and a dishwasher, who only need to clock in and out, assign them the Time Clock Only access level.

Access Levels	Cook	Server	Manager
POS (All) — Provides employees access to all POS settings in this section.			✓
Time Clock Only — Enables employees access to the POS to clock in and out who have no other requirement to access the POS.	✓		
Ring Up Sales — Enables employees access to the order entry screen, for actions such as adding items to the guest check and accepting payments.		✓	✓
Can Accept Payments (Ring Up Sales) — Enables employees access to the order entry screen, for actions such as adding items to the guest.		✓	✓
Can Close Orders (Ring Up Sales) — Enables employees access to the order entry screen, for actions such as accepting payments.		✓	✓
Use Employee Shifts (Can Close Orders) — Enables employees to use an employee financial shift for tracking financial responsibility of orders. **Note: You must have Drawer Checkout enabled to see this option.**			✓
Use Drawer Shifts (Can Close Orders) — Enables employees access to use a drawer shift for tracking financial responsibility of orders. **Note: You must have Drawer Checkout enabled to see this option.**		✓	
Cash Drawer Recount — Enables employees access to recount their cash at the cash reconciliation screen.			✓
Print/Show End Shift Totals – When enabled, the end of shift summary will display on the POS and be printable on the POS.			✓
Cash Drawer — Allows employees with Ring Up Sales and Cash Drawer access to open a cash drawer during the course of a normal transaction. For example, you may provide a bartender Cash Drawer access but not a server. If they both		✓	✓

Access Levels	Cook	Server	Manager
use a device connected to a cash drawer, the cash drawer will open for the bartender, but not for the server.			
Declare Tips — Requires employees to declare credit card tips at the end of a labor shift.		✓	✓
No Sale (Open Drawer) — Permits employees to open the cash drawer by tapping **No Sale** at the order entry screen.		✓	✓
Void Items/Ticket — Permits employees to void individual items or an entire guest check.		✓	✓
Void Online Orders — Permits employees to void online orders.		✓	✓
Apply Discounts/Promotions — Permits employees to apply a discount or promotion to an item or a guest check. An employee with this ability can apply any active discount or promotion available to a guest check.			✓
Approve Discounts/Promotions — Permits employees to approve a discount or promotion to an item or a guest check. An employee with this ability can apply any active discount or promotion available to a guest check.			✓
Change Tax — Permits employees to change the tax rate on a guest check to a different rate.			✓
Exempt Tax — Permits employees to change the tax rate to '0' on a guest check.		✓	✓
Perform Refunds — Permits employees to perform a refund for a customer.			✓
Recall Any Order — Permits employees to recall orders created by other employees. By not enabling this access, an employee can only recall their own orders.			✓
Reopen Ticket — Permits employees to reopen any guest check to add items or to change the payment tender.			✓
Adjust Tips for Others— Permits employees to adjust the credit card tips of other employees.			✓

Access Levels	Cook	Server	Manager
Category/Item Management — Permits employees to add categories and items to the menu at the order entry screen in the POS app, and to re-arrange the item and category buttons on a device, which changes the appearance and arrangement of the item and category buttons across all devices.			✓
Set Item Availability — Permits employees to manage item availability on the POS.			✓
Pending Credit — Permits employees to view data in the Pending Credit screen.			✓
POS Settings — Permits employees to access the Settings screen and change the settings for the device they are actively using.			✓
Scoreboard Access – Permits employees to access the Silver Scoreboard report on the POS.			✓
Offline Mode Management — Permits employees to put a device into offline mode when a device becomes disconnected from the server.			✓
Business Date Management — Permits employees to manage previous business dates in the POS app, and perform functions such as closing open labor and financial shifts, reopening a financial shift, and closing a previous, open business date.			✓
Take Order Ownership — Allows employees to take ownership of a table owned by another employee, and to modify the order. When an employee assumes ownership of a table, they become financially responsible for the table. By not enabling this access, the order is read-only to the employee, and the employee can only print a guest check that belongs to the table of another employee.			✓
Add Charge to Ticket — Permits employees to manually add a charge to a guest check.		✓	✓
Enter Manual Weight for Scale Items — Permits employees to enter a manual weight for scale items.			✓
Approve Early Break Return — Permits employees to approve an early break return.			✓

UNDERSTANDING LEVELS OF ACCESS TO SILVER BACK OFFICE

For employees with access to Silver Back Office, you assign them the ability to access each screen. Once you grant an employee access to a screen in Silver Back Office, they can perform any of the functions available on that screen. The system divides access to the various Silver Back Office screens into the following sections: My Store, Results, MENU, Customers, Employees, Settings, Help, and Account Information. You can also select **Back Office Access (All)** to provide a user role with access to all the screens and functions in Silver Back Office.

Understanding Levels of Access to My Store	Shift Manager	Manager
My Store (All) — Permits employees access to all My Store settings in this section.	✔	✔
Activity Summary and Alerts — Permits employees access to the Activity Summary and Alerts screen.	✔	✔
Sales Dashboard — Permits employees access to the Sales Dashboard screen.	✔	✔
Customer Dashboard — Permits employees access to the Customer Dashboard screen.	✔	✔

Understanding Levels of Access to Results	Shift Manager	Manager
Results (All) — Permits employees access to all the Results settings in this section.	✔	✔
Reports (All) — Permits employees access to all reports in Silver Back Office. You can restrict access to only specific reports by selecting those specific reports.	✔	✔
POS Transactions — Permits employees access to the POS TRANSACTIONS screen where employees can search POS transactions for a selected time period and re-print customer receipts.	✔	✔
Financial Shifts — Permits employees access to the FINANCIAL SHIFTS screen where they can enter Receive Cash amounts from employees.	✔	✔
Credit Settlement — Permits employees access to the CREDIT SETTLEMENT screen where employees can view and search credit card batches, void credit card transactions, and settle batches.	✔	✔

Understanding Levels of Access to Menu	Shift Manager	Manager
Menu (All) — Permits employees access to all the MENU settings in this section.	✔	✔
Categories and Items — Permits employees access to the CATEGORIES & ITEMS screen where employees can view, add, modify, and delete categories and items for your menu.	✔	✔
Modifiers — Permits employees access to the MODIFIER GROUPS screen where employees can view, add, modify, and delete modifiers and modifier groups.	✔	✔
Department — Permits employees access to the DEPARTMENTS screen where employees can view, add, modify, and delete departments.	✔	✔
Tags — Permits employees access to the TAGS screen where employees can view, edit, add, modify, and delete tags. By default, the system only assigns this access level to the Account Manager user role.		✔
Discounts — Permits employees access to the DISCOUNTS screen where employees can view, add, modify, and delete discounts.		✔
Promotions — Permits employees access to the PROMOTIONS screen where employees can view, add, modify, and delete promotions.		✔
Price Lists — Permits employees access to the PRICE LISTS screen where employees can view, add, and modify prices.		✔
Events — Permits employees access to the Events screen where employees can view, add, modify, and delete events.	✔	✔

Understanding Levels of Access to Customers	Shift Manager	Manager
Customers (All) — Permits employees to access all settings in the CUSTOMERS section.		✔
Email Marketing — Permits employees access to the EMAIL MARKETING screen where employees can view, add, modify, delete, send, and activate email marketing messages.		✔
Loyalty Program — Permits employees access to the LOYALTY PROGRAM screen where employees can view, add, modify, and disable your loyalty program.		✔

Understanding Levels of Access to Customers	Shift Manager	Manager
Survey Program — Permits employees access to the SURVEY screen where employees can view, add, and modify your survey program.		✓
Customers — Permits employees access to the CUSTOMERS screen where employees can view, add, modify, and delete customers from your customer database.	✓	✓
Social — Permits employees access to the SOCIAL screen where employees can view, add, modify, and delete your social media settings.		✓
House Accounts — Permits employees access to the HOUSE ACCOUNTS screen where employees can view, add, modify, and delete your house accounts.		✓

Understanding Levels of Access to Employees	Shift Manager	Manager
Employees (All) — Permits employees access to all settings in the EMPLOYEES section.		✓
Employees — Permits employees access to the EMPLOYEES screen where they can view, add, modify, and delete employee information, permissions, pay rates, and login credentials.	✓	✓
Labor Shifts — Permits employees access to the LABOR SHIFTS screen where they can view, add, modify, and delete labor shifts for employees.	✓	✓
User Roles — Permits employees access to the USER ROLES screen where they can view, add, modify, and delete user roles, and modify levels of access for user roles.		✓

Understanding Levels of Access to Settings	Shift Manager	Manager
Settings (All) — Permits employees access to all the Settings available in this section.		✓
Company — Permits employees access to the Company screen to view and modify company information.		✓
Store — Permits employees access to the Store screen to view and modify store and receipt		✓

Understanding Levels of Access to Settings	Shift Manager	Manager
information.		
Taxes — Permits employees access to the Taxes screen to view, add, modify, and delete tax categories, tax rates, locations, and tax jurisdictions.		✓
Payments — Permits employees access to the Payments screen to view, add, modify, and delete tender information.		✓
Pay In/Out Codes — Permits employees access to the Pay In/Out Codes screen to view, add, modify, and delete pay in and pay out codes.		✓
Charges — Permits employees access to the Charges screen to view, add, modify, and delete Charges.		✓
Kitchen Routing— Permits employees access to the Kitchen Routing screen to view, add, modify, and delete kitchen printer groups, and to associate a kitchen printer with a kitchen printer group.	✓	✓
Admin — Permits the account manager access to the Admin screen.		✓

Understanding Levels of Access to Help	Shift Manager	Manager
Help — This feature is slated for a later release.		
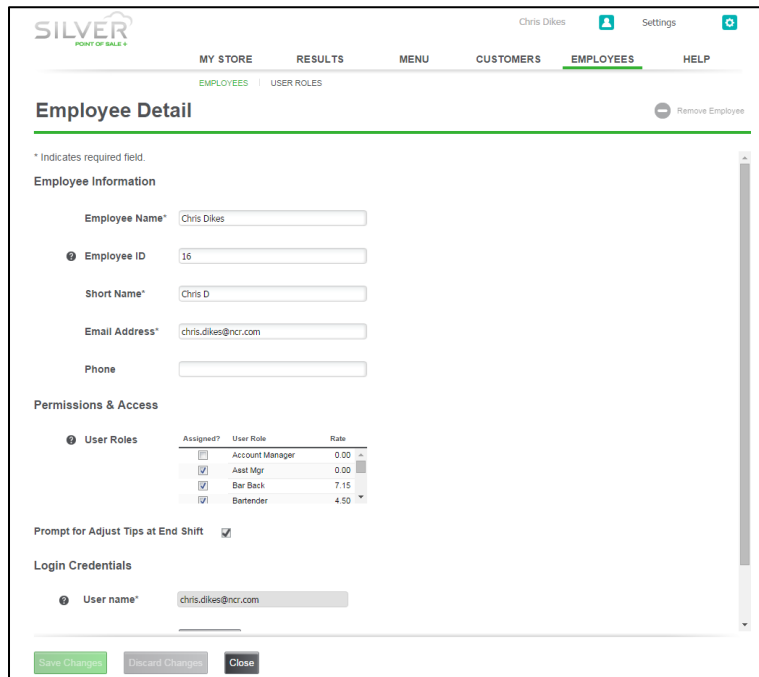
Understanding Levels of Access to Account Information	Shift Manager	Manager
Account Information (All) — Permits employees access to all Account information available in this section.		✓
Reset Password — Allows employees to reset their own password.	✓	✓
Logout — Allows employees to log out of Silver Back Office.	✓	✓

Understanding Levels of Access to Account Information	Shift Manager	Manager
My Account — Permits employees access to view the My Account screen, to add additional stores, to deactivate devices, and to view My Bills.		✓
Buy Hardware — Permits employees to purchase hardware for your restaurant.		✓
Register Hardware — Permits employees access to register hardware for use in your restaurant.		✓
Register Device — Permits employees to activate a device upon installation of the NCR Silver Pro Restaurant app on a device.	✓	✓

ADDING AN EMPLOYEE

1. Select **EMPLOYEES > EMPLOYEES**.

2. Click **Add an Employee**.

3. Type the **employee name**.

4. Type an **employee ID** or leave the field **blank** to accept a system generated ID number.

5. Type a **short name** for the employee. The short name appears on reports.

6. Type an **email address** for the employee. This is required for employees needing access to Silver Back Office.

7. (Optional) Type a **phone number** for the employee.

8. Under Permissions and Access, select the **user roles** for the employee. Select **all** that apply. You must provide an employee with at least one user role.

    You can only assign an employee a user role with your user role rank or lower.

    When an employee with multiple user roles clocks in, the employee selects a user role for the shift; however, when an employee selects a user role with a lower access level, the system applies the highest access level assigned to the employee rather than the user role.

9. (Multi-Store only) Click **Assign Stores** and select the **stores** for which the employee will be working.

10. Select **Prompt for Adjust Tips at End Shift** for the POS app to prompt the employee to adjust tips on credit card transactions when they end a shift. By default, NCR Silver Pro Restaurant enables this feature.

11. Under Login Credentials, type a **name**, such as an email address for employees who will access the Silver Back Office.

12. Create a **unique four to eight-digit PIN** for each employee who requires access to the POS app, even if only to clock in and out. Give the PIN to the employee.

13. Type a **password** for Silver Back Office and then type it again in Confirm Password.

14. Click **Save Changes**.

ONLINE ORDERING

For successful receipt and processing of online orders, you must provide certain API information to the online ordering system. You may also need to make additional changes to your NCR Silver Pro Restaurant configuration.

Online Ordering can be configured to auto-close fully paid orders. If you wish to implement this configuration for your restaurant, please contact Silver customer care and request this.

Use the following as a checklist in preparing your system for online ordering:

Step	Action
1	Provide the **API information** to your online ordering system provider. Refer to 'Locating Your API Information' in this section.
2	In Silver Back Office, configure **store locations** for online ordering by selecting **Enable Takeout and Delivery**, if you have not previously done so. o (Optional) Set guest receipts to **auto-close fully paid checks** for online orders. o (Optional) Change the **default takeout** and **delivery download threshold times**. The default time is 30 minutes for takeout orders and 60 minutes for delivery orders.
3	Configure the **necessary kitchen printers** for takeout and delivery, if you have not previously done so. When the POS app receives an online order, it prints a kitchen chit to the defined takeout and delivery printer. If desired, you can configure the kitchen printer to print one item per chit.
4	Confirm your **menu items** contain a kitchen printer assignment.
5	Review your **user roles** and ensure the appropriate user roles possess the required access levels to work with online orders. To process online orders, an employee must have a user role with the 'Take Order Ownership' access level; otherwise, online orders appear read-only. To void online orders, an employee must have a user role with the 'Void Online Orders' access level.
6	Optionally, restrict the **devices** that can process online orders. By default, all devices can process online orders. On the devices you set to receive online orders, set the iPad Auto-Lock feature to never to ensure the iPad remains awake and receives incoming online orders.

LOCATING YOUR API INFORMATION

You must provide your client ID and client secret for your online ordering system to communicate with the Silver host for your restaurant. The client ID is a unique identifier for your restaurant, and the client secret, which you must create if you have not previously done so, is a lengthy string of unique characters the system creates, similar to a password.

1. Log in to **Silver Back Office** through a Web browser.
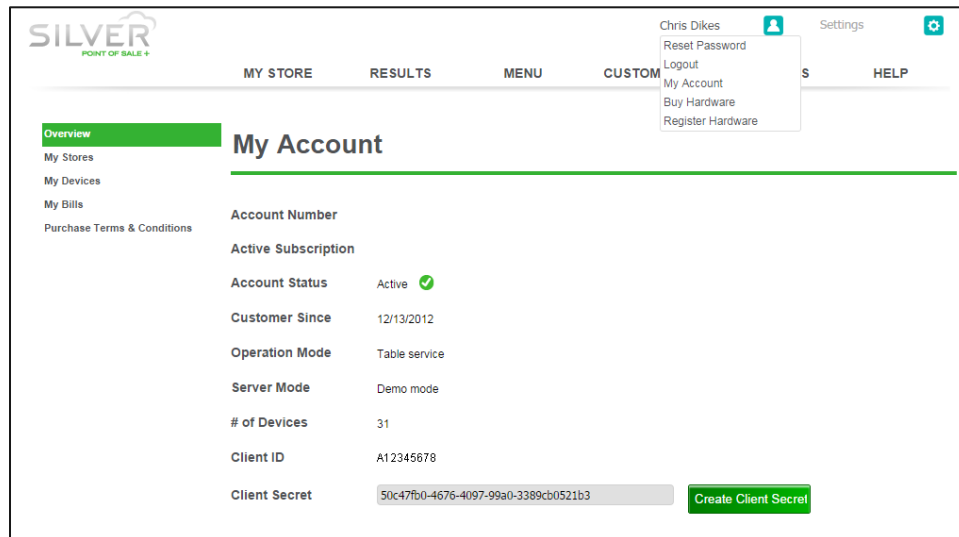
2. Click your **username** at the top right side of the screen and select **My Account** from the drop-down list that appears, to display your account information.

3. If you do not see a character string listed in 'Client Secret' on the My Account screen, click **Create Client Secret**. The system creates your unique client secret and inserts it into the field. If you see a character string, do **not** click Create Client Secret.

4. Provide your **Client ID** and the **client secret character string** to your online ordering system provider

CONFIGURING THE STORE LOCATION PHONE/DRIVE THRU

Since NCR Silver Pro Restaurant delivers online orders to the Phone/Drive Thru queue of the POS app, you must enable takeout and delivery.

1. Select **Settings > Store**.

2. Select **Store Options**.

3. Enable any of the desired order modes like Takeout and Delivery.

4. Click **Save**.

REVIEWING ONLINE ORDERS IN SILVER BACK OFFICE

Once you begin receiving online orders, you can use the POS Transactions screen to search and review transactions. Access this screen in Silver Back Office at **RESULTS > POS Transactions**.

The POS Transactions screen includes details about the online order, including the items for order, the customer name, the ticket number, and much more. This screen also provides information regarding:

- The **Operator Name**, which identifies the virtual or actual employee in possession of the order.

  If the system displays 'Online User' as the operator, then an actual employee has yet to touch the order.

  If the system displays an employee name, the named employee is the last employee to touch the order on the POS app.

- The **Station**, which identifies whether the order resides at the Silver host (referenced as the Online Device), or on a specific device.

- The **Order Status**. An online order passes through three states:

  o **Submitted** — An order starts as 'Submitted' when the Silver host receives the order from the online ordering system. A submitted order has yet to be sent to the POS app.

  o **Processed** — An order changes to 'Processed' when the Silver host sends the order to the POS app. The order now resides on the POS app.

o **Picked Up** — An order ends as 'Picked Up' when an employee closes the guest check. The system identifies the operator as the employee who closed the guest check, and is, therefore, financially responsible for it.

UNDERSTANDING THE ONLINE USER EMPLOYEE

When the Silver host receives an online order from the online ordering system, the Silver host assigns the order to the 'Online User' employee, which is a virtual employee. The system automatically creates the 'Online User' employee, and this virtual employee does not appear in your employee list. Additionally, the system initially assigns the financial responsibility for the online order to the Online User employee; however, when an actual employee closes the guest check of the online order, the system assigns the financial responsibility to that employee.

MULTI STORE ENVIRONMENTS

For restaurants with multiple stores, NCR Silver Pro Restaurant enables you to centrally manage multiple stores with one login. NCR Silver Pro Restaurant contains a company level and specific store levels for you to manage your operation. Each level includes different configuration, control, and managing capabilities.

At the company level, you can control such things as items, modifiers, discounts, user roles, and mores. At the store level, you can customize information specific to each store, such as tax rates, receipt information, pricing, and more.

ADDING A STORE

To add additional stores, contact the customer care team at 877-270-3475.

LOGGING IN TO A MULTI-STORE ENVIRONMENT

You access Silver Back Office through a Web browser to configure the majority of settings related to your restaurant, such as your company and store information, menu, employees, user roles, taxes, payments, and more. When you log in to Silver Back Office, you select whether to access data at the company level or for a specific store. You can easily change from one to the other.

To restrict an employee from accessing data at the company level and specific stores, refer to the 'Using EMPLOYEES' section.

To select the company level or a specific store:

1. Access **Silver Back Office** through a Web browser.

2. Type your **username** and **password**. The 'Select Store' prompt appears.

3. Click **Company View (All Stores)** or the **specific store** you want to view.

    The name of the selected location appears to the left of your username at the top right side of the screen.
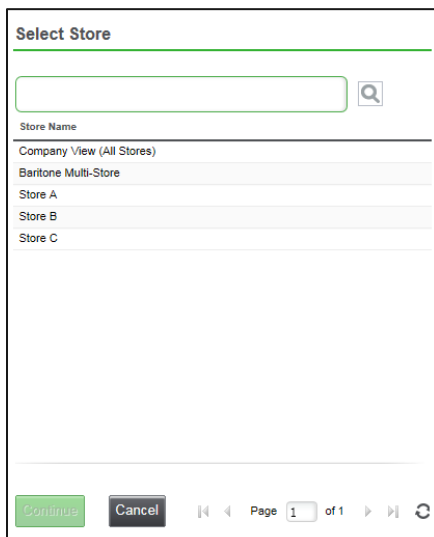
    To switch to a different store view or to the company level, refer to the section 'Changing the Location View.'

4. Click **Continue**. The Web browser opens to the My Store page for the level you selected.

To change the location view:

You can quickly change your view from the company level to a specific store, from one store to another, or from a store to the company.

1. Click to the left of your username at the top right side of the screen. The 'Select Store' prompt appears.

Select Store

Store Name
Company View (All Stores)
Baritone Multi-Store
Store A
Store B
Store C

Continue   Cancel   Page 1 of 1

2. Select the **specific store** or **Company View (All Stores)** and click **Continue**. The system switches your view in Silver Back Office to the selected location.

DIFFERENCES BETWEEN COMPANY AND STORE LEVEL ACCESS

The following section outlines which Silver Back Office pages are accessible, editable, or read-only at the company and store levels.

SETTINGS

Use the Settings menu at the top right side of the screen, to configure company information, store information, taxes, payments and kitchen printing. Click **Settings** to access the drop-down menu.

Menu Option	Company Level	Store Level
Company Information	Add and edit company information.	Read-only.
Store Information	Add and edit at the Store Configuration screen. Store Options is not accessible.	Add and edit the Store Configuration and Store Options screens.
Taxes	Add and edit.	Edit the tax rates for a tax category, and add and edit tax jurisdictions.
Payments	Not available.	Add and edit.
Pay In/Out Codes	Add and edit.	Read-only.

Charges	Add and edit.	Read-only.
Kitchen Routing	Add and edit **kitchen groups** only.	Add and edit **kitchen printers** only.

RESULTS

Use the RESULTS menu to access reports, review and edit POS transactions, financial and labor shifts, and credit settlement. Some screens you access at the company level, and others at the store level.

At the company level, the reports summarize the data for your entire company; the reports do not break out the information on a store-by-store basis. To gather data for a specific store, switch the viewing level to the specific store and run the desired report.

Menu Option	Company Level	Store Level
REPORTS	Available at company and store level.	Available at company and store level.
POS Transactions	Not available.	Available at the store level.
Financial Shifts	Not available.	Available at the store level.
Labor Shifts	Not available.	Available at the store level.
Credit Settlement	Not available.	Available at the store level.

MENU

When you set up your menu, you define the items for sale in your restaurant and the manner in which they appear in the POS app. Categories allow you to organize your items for quick navigation in the POS. You can add modifiers for your menu items and create discounts and special pricing events. Some features are only available at the company level.
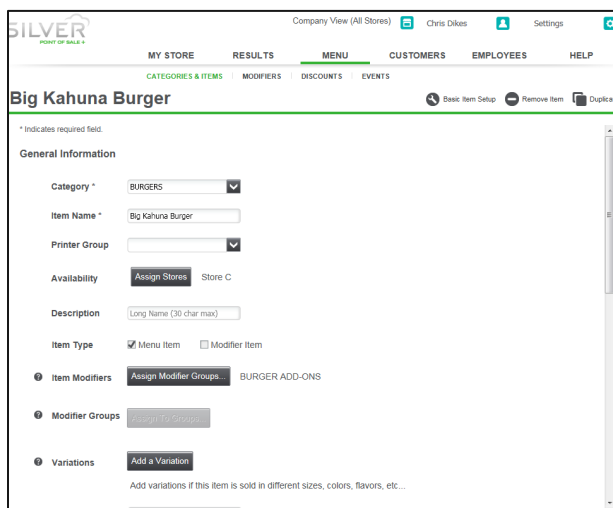
Menu Option	Company Level	Store Level
Categories & Items	Add and edit categories and items. Sort order of categories and items.	Categories are read-only. Add items, and edit prices.
Modifiers	Add and edit modifier groups and items. Sort order of modifiers.	Modifier groups are read-only. Edit pricing and availability for modifier items.
Price Lists	Add and edit price lists.	Add and edit price lists.
Departments	Add and edit departments.	Read-only at the store level.
Tags	Add and edit tags.	Read-only at the store level.
Discounts	Add and edit discounts.	Read-only at the store level.

Promotions	Add and edit promotions.	Add and edit store-level promotions. Company-level promotions are read-only.
Events	Add and edit events.	Read-only at the store level.

To create an item at the company level for specific stores:

By default, when creating an item at the company level, the system assigns the item to all stores. To assign an item to a specific store, it is necessary to identify the stores at which the item is available. You can also edit an item to modify the stores for which it is available.

1. Click **Add item** to create a new item.

    -OR-

    Click the **item** you want to edit.

    The Extended Item Setup screen appears.

2. For new items, enter the **item information**.

3. Under 'General Information,' click **Assign Stores** to assign the item to specific stores. A POS AVAILABILITY prompt appears.

4. Click the **stores** for which you want to make the item available.

5. Click **Done**.

6. Click **Save**.

On the item screen, the system identifies the stores to which you assigned the item. If the item is available to all stores, All Stores appears next to Assign Stores.

To create an item at the store level:

At the store level, you can create an item for use in your store; however, you cannot assign the item to other stores or assign modifier groups to the item. To assign modifier groups to the item, switch to the **company level**, select the **item**, and add the **modifier groups** to it.

To assign the item to other stores, switch to the **company level**, and assign the item to the stores where you want to make it available. Refer to the section 'Creating an Item at the Company Level for Specific Stores,' for more information.

To filter the item availability view:

You can filter items based on whether they are **POS Active** when viewing menu items in the Silver Back Office. This makes it easier to view the items currently in use on the POS.
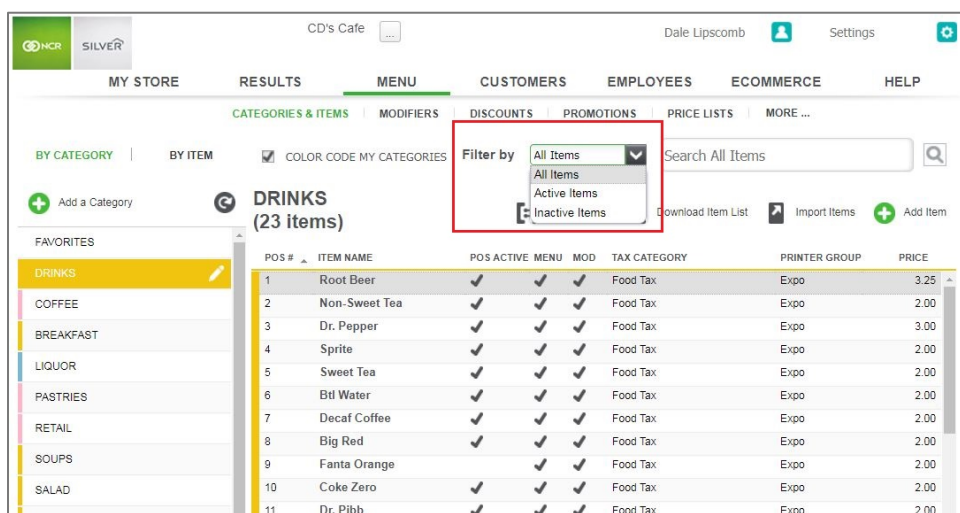
ITEM ASSIGNMENT IN NEW STORES

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

The selection pop-up is displayed on the Menu 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.

CUSTOMERS

NCR Silver Pro Restaurant enables you to compile customer information, create a loyalty program for your customers, use email messages to market to your customers, and link to social media pages, such as Facebook and Twitter.

Menu Option	Company Level	Store Level
Email Marketing	Add, edit, and manage email marketing messages.	Not available.
Loyalty Program	Add, edit, and manage the loyalty program.	Read-only.
Survey	Read-only.	Add, edit, and manage survey settings.

Customers	Add, edit, and manage customer database.	Add, edit, and manage customer database.
Social	Add, edit, and manage social media links.	Not available.
House Accounts	Add, edit, and manage house accounts.	Add, edit, and manage house accounts.

EMPLOYEES

The EMPLOYEES menu allows you to create and manage user roles and to add and manage your employees.

USER ROLES is read-only at the store level.

You can create employees at both the company and store level; however, you can only assign an employee to multiple stores at the company level. When you create an employee at the store level, the system assigns the employee to that same store. To assign the employee to additional stores, it is necessary to switch to the company view, and assign the employee to the other stores.

ADDING AN EMPLOYEE AT THE COMPANY LEVEL

When you add an employee at the company level, it is necessary to assign the employee to the stores at which they will work. You can also edit an employee to assign them to additional stores.

1. Click **Add an Employee**.

   -OR-

   To edit an existing employee, click the **employee name**.

   The 'Employee Details' screen appears.

2. For new employees, enter the **employee information**.

3. Under 'Permissions and Access,' click **Assign Stores**. The Select Stores prompt appears.

4. Select the **stores** to assign to the employee.

5. Click **Done**.

6. Click **Save Changes**.

On the Employee Detail screen, the system identifies the stores you assigned to the employee. If you assign the employee to all stores, All Stores appears next to Assign Stores.

DEFINING THE LOCATIONS AN EMPLOYEE CAN ACCESS

You control whether the employee can access the company level or specific stores in Silver Back Office. To allow access to both the company level and all stores, assign the employee to **All Stores** under 'Permissions and Access' on the Employee Detail screen. To restrict access to specific stores, assign the employee to the specific stores you want them to access.

NCR Silver Customer Care: 877-270-3475

Customercare.ncrsilver.com

APPENDIX A: TAX TABLES

The following provide a list of examples of creating tax tables.

FLORIDA 4.5% TAX TABLE

1. Select **Settings > Taxes**.

2. Click **Add Tax Table**.

3. Type a **name** for the tax table, such as 'Florida 4.50%.'

4. Leave the **amount** as '0.00' for 'START.'

5. Enter the '**2.00**' for 'REPETITION.'

6. Enter the '**.09**' in 'TAX.'

7. Click '**+**' to add a breakpoint for the amount of '0.00,' and then click '**+**' again to add the first breakpoint from your tax table.

NCR Silver Pro Restaurant Tax Table Entered Values	Florida 4.50% Tax Table Example

8. Referring to the Florida 4.5% tax table, enter the **starting sales amount** for the breakpoint. For example, if the sales range for the breakpoint is '.10' to '.22,' you only need to enter '.10. The system automatically enters the amount for the TAX column.

9. Click '**+**' to move to the next breakpoint.

10. Repeat for as many **breakpoints** as necessary. In this example, the period of repetition is 2.00. Enter breakpoints up to the sales amount of '$2.09.'

11. Click **Save Changes**. Refer to 'Setting Up a Tax Category' for how to specify a tax table for a tax category.

FLORIDA 6.0% TAX TABLE

1. Select **Settings > Taxes**.

2. Click **Add Tax Table**.

3. Type a **name** for the tax table, such as 'Florida 6.00%.'

4. Leave the **amount** as '0.00' for 'START.'

5. Enter the '**1.00**' for 'REPETITION.'

6. Enter the '**.06**' in 'TAX.'

7. Click '**+**' to add a breakpoint for the amount of '0.00,' and then click '**+**' again to add the first breakpoint from your tax table.
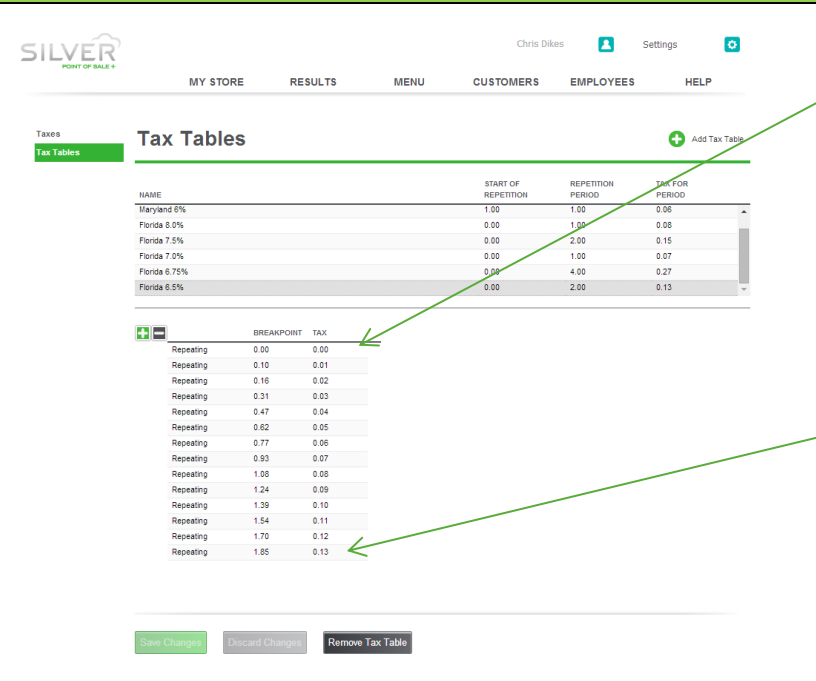

8. Referring to the Florida 6.0% tax table, enter the **starting sales amount** for the breakpoint. For example, if the sales range for the breakpoint is '.10' to '.16,' you only need to enter '.10.' The system automatically enters the amount for the TAX column.

9. Click '**+**' to move to the next breakpoint.

10. Repeat for as many **breakpoints** as necessary. In this example, the period of repetition is 4.00. Enter breakpoints up to the sales amount of '$1.09.'

11. Click **Save Changes**. Refer to 'Setting Up a Tax Category' for how to specify a tax table for a tax category.

FLORIDA 6.25% TAX TABLE

1. Select **Settings > Taxes**.

2. Click **Add Tax Table**.

3. Type a **name** for the tax table, such as 'Florida 6.25%.'

4. Leave the **amount** as '0.00' for 'START.'

5. Enter the '**4.00**' for 'REPETITION.'

6. Enter the '**.25**' in 'TAX.'

7. Click '**+**' to add a breakpoint for the amount of '0.00,' and then click '**+**' again to add the first breakpoint from your tax table.

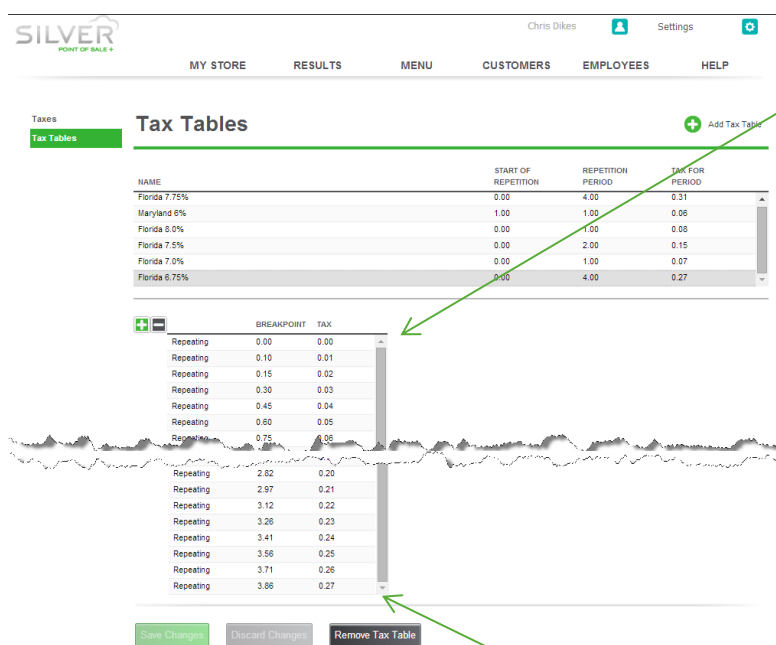| NCR Silver Pro Restaurant Tax Table Entered Values	Florida 6.25% Tax Table Example

Amount of Sale		Tax
.10	- .16	.01
.17	- .32	.02
.33	- .48	.03
.49	- .64	.04
.65	- .80	.05
.81	- .96	.06
.97	- 1.12	.07
1.13	- 1.28	.08
1.29	- 1.44	.09
1.45	- 1.60	.10
1.61	- 1.76	.11
1.77	- 1.92	.12
1.93	- 2.08	.13
2.09	- 2.24	.14
2.25	- 2.40	.15
2.41	- 2.56	.16
2.57	- 2.72	.17
2.73	- 2.88	.18
2.89	- 3.04	.19
3.05	- 3.20	.20
3.21	- 3.36	.21
3.37	- 3.52	.22
3.53	- 3.68	.23
3.69	- 3.84	.24
3.85	- 4.09	.25

8. Referring to the Florida 6.25% tax table, enter the **starting sales amount** for the breakpoint. For example, if the sales range for the breakpoint is '.10' to '.16,' you only need to enter '.10.' The system automatically enters the amount for the TAX column.

9. Click '**+**' to move to the next breakpoint.

10. Repeat for as many **breakpoints** as necessary. In this example, the period of repetition is 4.00. Enter breakpoints up to the sales amount of '$4.09.'

11. Click **Save Changes**. Refer to 'Setting Up a Tax Category' for how to specify a tax table for a tax category.

FLORIDA 6.50% TAX TABLE

1. Select **Settings > Taxes**.

2. Click **Add Tax Table**.

3. Type a **name** for the tax table, such as 'Florida 6.50%.'

4. Leave the **amount** as '0.00' for 'START.'

5. Enter the '**2.00**' for 'REPETITION.'

6. Enter the '**.13**' in 'TAX.'

7. Click '+' to add a breakpoint for the amount of '0.00,' and then click '+' again to add the first breakpoint from your tax table.

8. Referring to the Florida 6.50% tax table, enter the **starting sales amount** for the breakpoint. For example, if the sales range for the breakpoint is '.10' to '.15,' you only need to enter '.10.' The system automatically enters the amount for the TAX column. '

9. Click '+' to move to the next breakpoint.

10. Repeat for as many **breakpoints** as necessary. In this example, the period of repetition is 2.00. Enter breakpoints up to the sales amount of '$2.09.'

11. Click **Save Changes**. Refer to 'Setting Up a Tax Category' for how to specify a tax table for a tax category.

FLORIDA 6.75% TAX TABLE

1. Select **Settings > Taxes**.

2. Click **Add Tax Table**.

3. Type a **name** for the tax table, such as 'Florida 6.75%.'

4. Leave the **amount** as '0.00' for 'START.'

5. Enter the '**4.00**' for 'REPETITION.'

6. Enter the '**.27**' in 'TAX.'

7. Click '+' to add a breakpoint for the amount of '0.00,' and then click '+' again to add the first breakpoint from your tax table.

8. Referring to the Florida 6.75% tax table, enter the **starting sales amount** for the breakpoint. For example, if the sales range for the breakpoint is '.10' to '.14,' you only need to enter '.10.' The system automatically enters the amount for the TAX column.

9. Click '+' to move to the next breakpoint.

10. Repeat for as many **breakpoints** as necessary. In this example, the period of repetition is 4.00. Enter breakpoints up to the sales amount of '$4.09.'

11. Click **Save Changes**. Refer to 'Setting Up a Tax Category' for how to specify a tax table for a tax category.

FLORIDA 7.0% TAX TABLE

1. Select **Settings > Taxes**.

2. Click **Add Tax Table**.

3. Type a **name** for the tax table, such as 'Florida 7.00%.'

4. Leave the **amount** as '0.00' for 'START.'

5. Enter the '**1.00**' for 'REPETITION.'

6. Enter the '**.07**' in 'TAX.'

7. Click '**+**' to add a breakpoint for the amount of '0.00,' and then click '**+**' again to add the first breakpoint from your tax table.

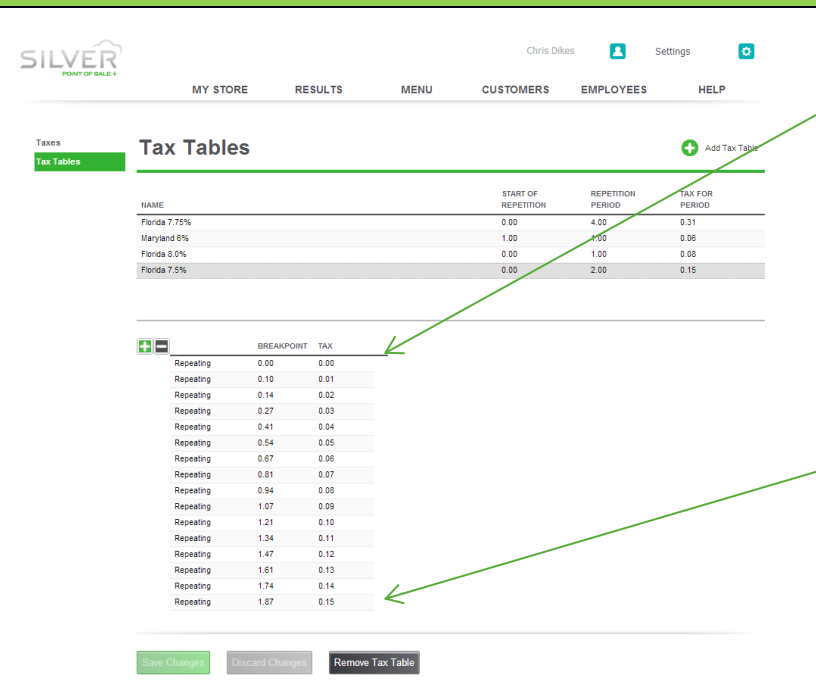| NCR Silver Pro Restaurant Tax Table Entered Values	Florida 7.00% Tax Table Example

8. Referring to the Florida 7.0% tax table, enter the **starting sales amount** for the breakpoint. For example, if the sales range for the breakpoint is '.10' to '.14,' you only need to enter '.10.' The system automatically enters the amount for the TAX column.

9. Click '+' to move to the next breakpoint.

10. Repeat for as many **breakpoints** as necessary. In this example, the period of repetition is 1.00. Enter breakpoints up to the sales amount of '$1.09.'

11. Click **Save Changes**. Refer to 'Setting Up a Tax Category' for how to specify a tax table for a tax category.

FLORIDA 7.5% TAX TABLE

1. Select **Settings > Taxes**.

2. Click **Add Tax Table**.

3. Type a **name** for the tax table, such as 'Florida 7.50%.'

4. Leave the **amount** as '0.00' for 'START.'

5. Enter the '**2.00**' for 'REPETITION.'

6. Enter the '**.15**' in 'TAX.'

7. Click '+' to add a breakpoint for the amount of '0.00,' and then click '+' again to add the first breakpoint from your tax table.

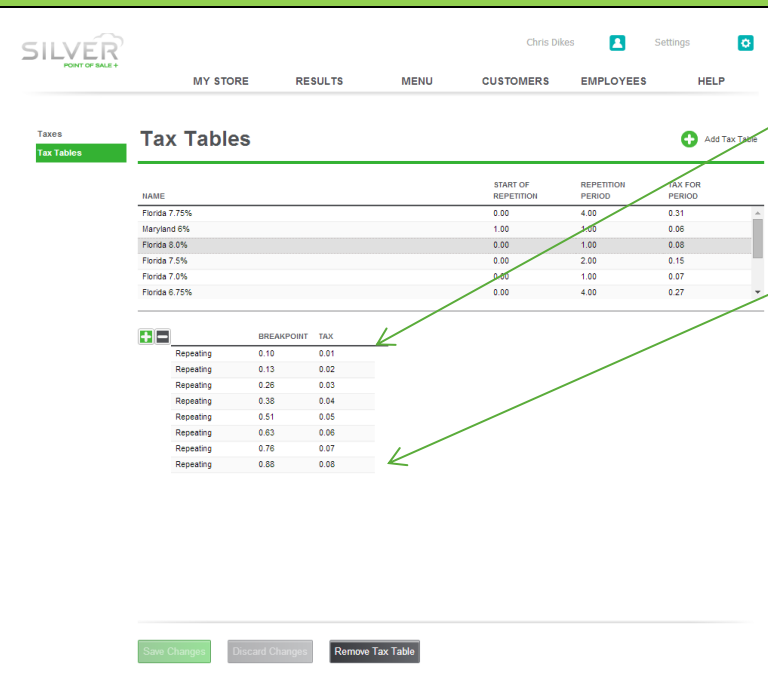| NCR Silver Pro Restaurant Tax Table Entered Values	Florida 7.50% Tax Table Example

8. Referring to the Florida 7.50% tax table, enter the **starting sales amount** for the breakpoint. For example, if the sales range for the breakpoint is '.10' to '.13,' you only need to enter '.10.' The system automatically enters the amount for the TAX column.

9. Click '+' to move to the next breakpoint.

10. Repeat for as many **breakpoints** as necessary. In this example, the period of repetition is 2.00. Enter breakpoints up to the sales amount of '$2.09.'

11. Click **Save Changes**. Refer to 'Setting Up a Tax Category' for how to specify a tax table for a tax category.

FLORIDA 8.0% TAX TABLE

1. Select **Settings > Taxes**.

2. Click **Add Tax Table**.

3. Type a **name** for the tax table, such as 'Florida '8.0%.'

4. Leave the **amount** as '0.00' for 'START.'

5. Enter the '**1.00**' for 'REPETITION.'

6. Enter the '**.08**' in 'TAX.'

7. Click '+' to add a breakpoint for the amount of '0.00,' and then click '+' again to add the first breakpoint from your tax table.

8. Referring to the Florida 8.0% tax table, enter the **starting sales amount** for the breakpoint. For example, if the sales range for the breakpoint is '.10' to '.12,' you only need to enter '.10.' The system automatically enters the amount for the TAX column.

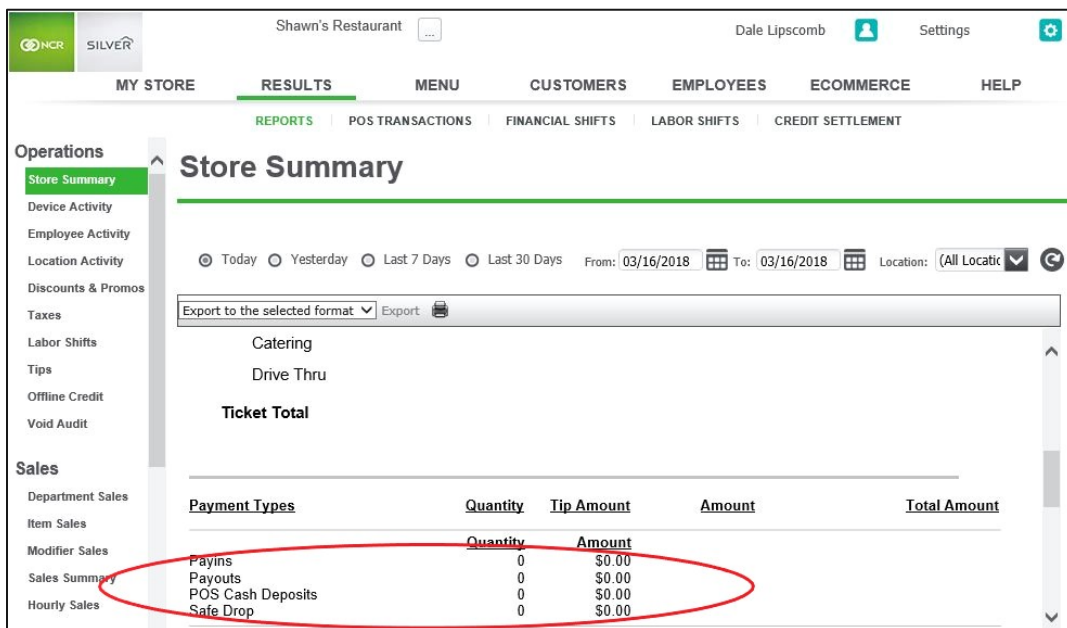9. Click '+' to move to the next breakpoint.

10. Repeat for as many **breakpoints** as necessary. In this example, the period of repetition is 1.00. Enter breakpoints up to the sales amount of '$1.09.'

11. Click **Save Changes**. Refer to 'Setting Up a Tax Category' for how to specify a tax table for a tax category.

APPENDIX B: SAFE DROPS

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

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

The Safe Drop Pay out code has always been available on the POS, but it can no longer be removed from the reason codes.

Safe Drop Example:

The example below illustrates how a Safe Drop work:

- Cashier completes a $349.00 cash sale.

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

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

- Shift ends

If the financial shift started with $0.00 in cash.

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

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

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

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

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