



# NCR Silver Pro Restaurant Edition



## v3.11 Release Notes

Release Date: May 23, 2016

## New 4.0 Silver Pro features

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# House Accounts

## Overview

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 must do so in Silver Back Office before you can use them at the POS. Additionally, you must link at least one customer to the house. You may link additional customers, if you prefer. 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 and 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.

Additional information regarding house accounts can be found at [customer care.ncrsilver.com](http://customer care.ncrsilver.com).

**To add a house account:**

1. In Silver Back Office, select **CUSTOMERS > HOUSE ACCOUNTS**.
2. Select **Add a House Account**. The Add House Account dialog appears.

**Add House Account**

\* Indicates required field.

Name\*: NCR Email\*: george.smith@email.com

External ID: External ID Phone\*: 817-123-4567

Maximum Balance: 500.00 Address 1: 14770 Trinity Blvd

Enabled: ☒ Address 2: Address 2

Owner\*: George Smith Address 3: Address 3

Notes: Notes City: Fort Worth

State: Texas

Zip: 76155

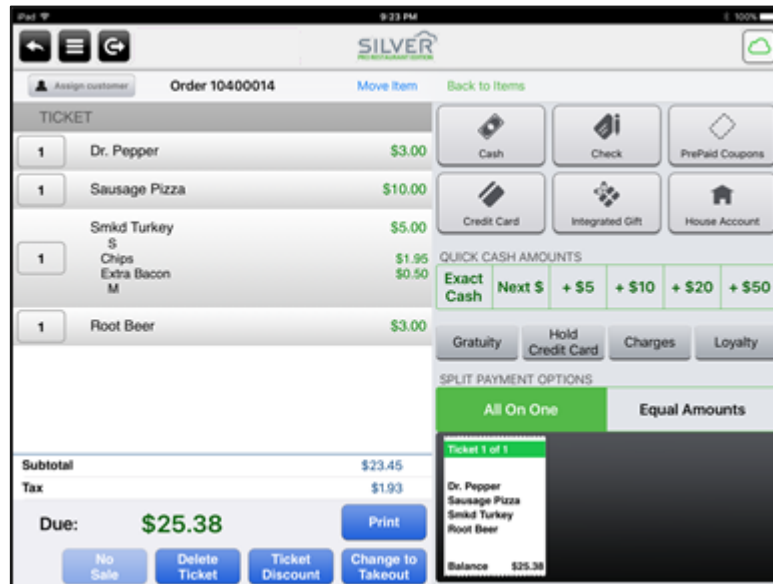
Customers: Select Customers

Save Changes Cancel

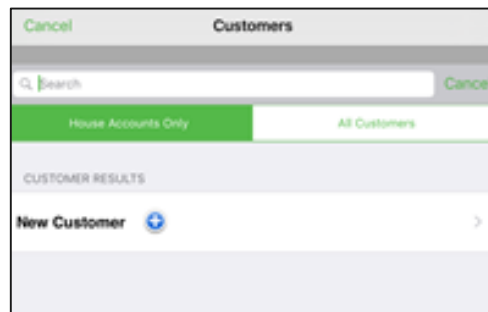
3. Type a **name** for the house account.
4. (Optional) Enter an **external ID** for the house account. For example, if you already have an existing account number you want to use, enter that number here.
5. Enter the **maximum balance** for the house account.
6. Click **Select owner** to select an owner 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. 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.
10. Click **Save Changes**.

To close a check to a house account:

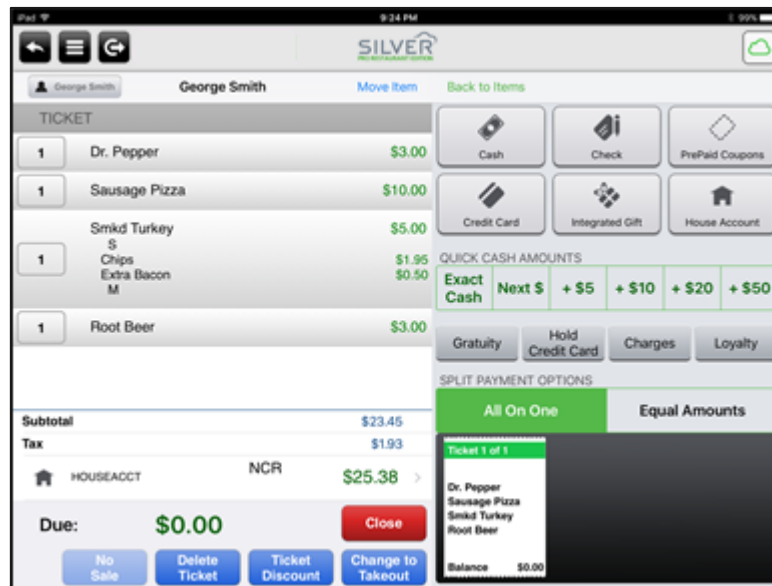
1. At the order entry screen, after you have added items to the guest check, tap **PAY**.



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



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



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

6. Tap **Close**.

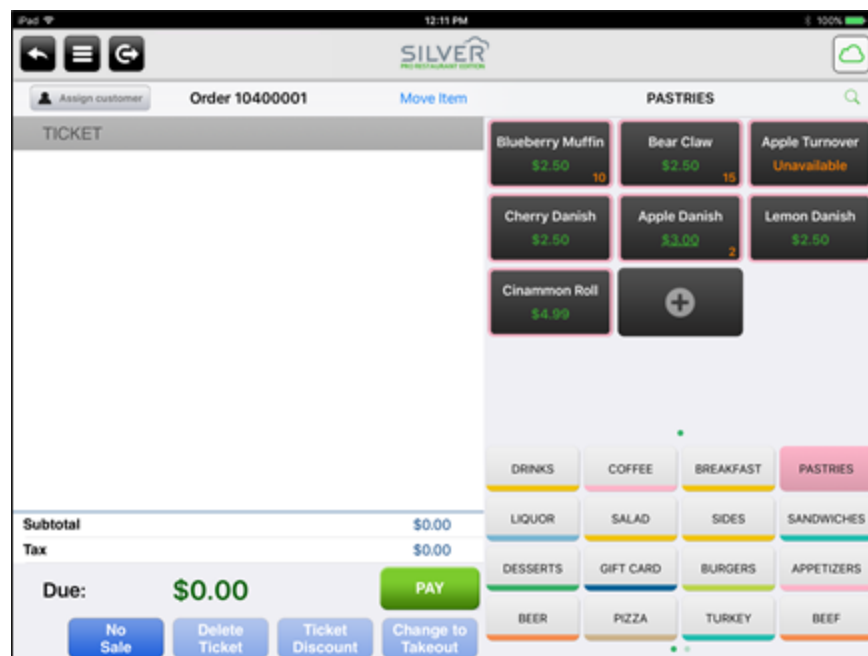
# Item Availability

## Overview

Silver Pro now provides you with the ability to set item availability at the POS, also known as '86ing items.' At the POS, you define an item's count. Each employee will be able to see the item count and when they add the item to an order, the POS decrements the quantity on hand. If all quantities of an item have been ordered, 'Unavailable' appears underneath the item and employees cannot add the item to the order.

An item with an 'unavailable' quantity remains as such until a supervisor or someone with the appropriate access updates the quantity or removes the limit.

With this feature, we have added a new access level, 'Set Item Availability.' Make sure to review your user roles and access levels to ensure employees have the proper access.




Item availability should not be confused with inventory.

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

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

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

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

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

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

Close	Enter Quantity on Hand
<input type="text"/>	
DRINKS	>
COFFEE	>
BREAKFAST	>
PASTRIES	>
Apple Danish	[ 2 ] >
Apple Turnover	[ 0 ] >
Bear Claw	No Limit >
Blueberry Muffin	[ 10 ] >
Cherry Danish	No Limit >
Cinammon Roll	No Limit >
Lemon Danish	No Limit >

5. Enter the **item quantity**.



Cancel      Quantity on Hand

---

**Bear Claw**      15

The Quantity on Hand values will not be synchronized to other devices without the use of the Silver Server

7

8

9

✕

4

5

6

No Limit

1

2

3

0

Done

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

# Generic Gift Card API

## Overview

In Silver Pro 3.11, we are introducing Generic Gift Card API. This service allows us to integrate with a number of gift card providers through the API. Please contact your sales representative for more information.

# Generic Loyalty API: Finalize Sync Call

## Overview

We continue to enhance our Generic Loyalty API. In v 3.11, we've made three enhancements to this feature. First, the Finalize call now occurs at the time of the ticket close. Previously, the finalize call occurred after the closing of the ticket. A synchronous finalize call enables third party loyalty providers to know that the ticket has been closed and to send a final receipt message and an updated loyalty balance to be printed on the customer receipt.

In the event of an Internet outage or an inability to contact the loyalty provider at the time of the ticket close, Silver Pro will queue the ticket and send it when a connection can be made to the loyalty provider. In this scenario, the customer receipt will not contain a customer message or an updated loyalty balance.



For more information on third party loyalty and provider options, please contact your sales representative.

# Generic Loyalty API: Loyalty UI Cleanup

## Overview

A second enhancement we've made to the Generic Loyalty API is to provide consistency across the Loyalty UI within the POS. Once a customer is assigned to a ticket, a user will always have three options at the bottom of the screen:

- Print points balance chit (this allows you to print a customer loyalty balance)
- Remove loyalty customer (in the event you selected the wrong customer, you can easily remove the assigned customer and search for another one)
- Lookup rewards again (to check the available rewards for the customer with the loyalty provider)

Cancel	Test A123	Done
		
Customer Profile		Loyalty Rewards
CUSTOMER INFORMATION		
Name	John Doe	
Member ID	JD123478	
Phone	817-123-4567	
Email	john.doe@email.com	
Print points balance chit	Detail	
Remove loyalty customer	Detail	
Lookup rewards again	Detail	

# Generic Loyalty API: Include Tags with Calls

## Overview

A final enhancement to the Generic Loyalty API includes the ability to add a tag ID to the ticket information sent to the loyalty provider. Tags are a way to group items, typically for promotions. However, they can be used for loyalty programs as well.

In Silver Pro, with the use of Generic Loyalty, when a customer is assigned to the ticket, the POS sends all of the ticket details to the loyalty provider. Some loyalty providers prefer the inclusion of a tag id as part of the ticket detail. A tag id enables the loyalty provider to group items so they can more quickly determine the points earned and possible rewards for a customer.

The inclusion of tags should only be done when specifically directed to do so by the loyalty provider.

1. In Silver Back Office, select **CUSTOMERS > LOYALTY PROGRAM**.
2. Select your **loyalty program**.

The screenshot shows the 'Create Loyalty Program' interface in the Silver Pro Back Office. The top navigation bar includes 'MY STORE', 'RESULTS', 'MENU', 'CUSTOMERS' (selected), 'EMPLOYEES', and 'HELP'. Below this, a sub-menu shows 'EMAIL MARKETING', 'LOYALTY PROGRAM' (selected), 'SURVEY', 'CUSTOMERS', 'SOCIAL', and 'HOUSE ACCOUNTS'. The main heading is 'Create Loyalty Program'. A note states: '\* Indicates required field.' The 'Program' section has a 'Program Type' dropdown set to 'Silver Generic Loyalty API'. Below this is a paragraph of text: 'NCR Silver publishes API for loyalty integration with external systems and several loyalty providers are integrated or integrating to this API. If your loyalty provider supports the API, they will be able to provide the information below and you will be able to connect your NCR Silver Point of Sale to them.' This is followed by a timestamp: 'Page last modified by System on 01/14/2016 08:53:20 PM UTC'. The 'Stores' section has an 'Assign Stores' button. The 'Required Parameters' section includes 'Server Url' (http://silverpro1.cloudapp.net:443/loyalty) and 'Access Token' (123456). The 'Optional Parameters' section includes 'Barcode on Receipts without Loyalty Member' (checked), 'Message on Receipts without Loyalty Member' (with a 'Download the app' button), 'Merchant ID' (empty), 'Allow Card Activation' (unchecked), 'Enable Manual Card Entry' (checked), and 'Send Tag IDs' (unchecked). At the bottom are 'Save' and 'Cancel' buttons.

3. Select **Send Tag IDs**.
4. Click **Save Changes**.

# Change Cash Drawer/Receipt Print Order

## Overview

In previous versions of Silver Pro, when a cash transaction was closed, the application would first print the receipt (if configured) and then would open the drawer. The result, especially when utilizing Bluetooth printers, was a 3-4 second delay in opening the drawer while the receipt was printed.

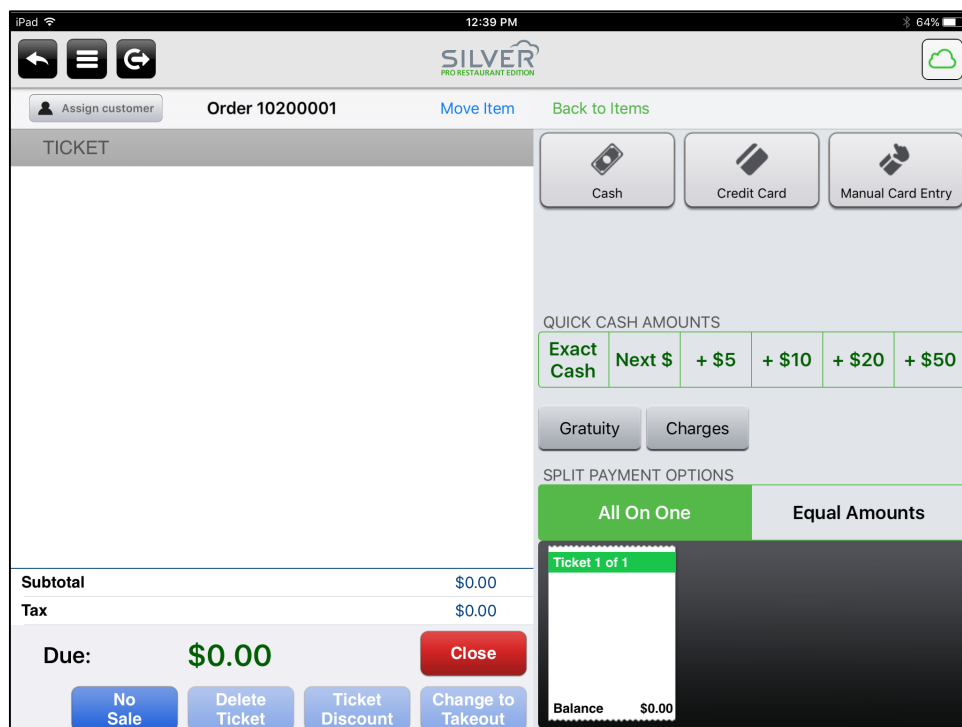
In v3.11, Silver Pro now reverses that order and first opens the drawer, then prints the receipt. This allows the cashier to begin making change while the receipt is printing.

# EMV Manual Card Entry

## Overview

In 3.11, we've enhanced the EMV capabilities to allow for manual card entry. Manual card entry may be useful for phone in orders or when an EMV reader is not properly reading a credit card. In instances of manual entry, signature capture is always required, regardless of the amount of the transaction.

When you activate manual card entry, a manual credit card tender button is added to the Payments screen.



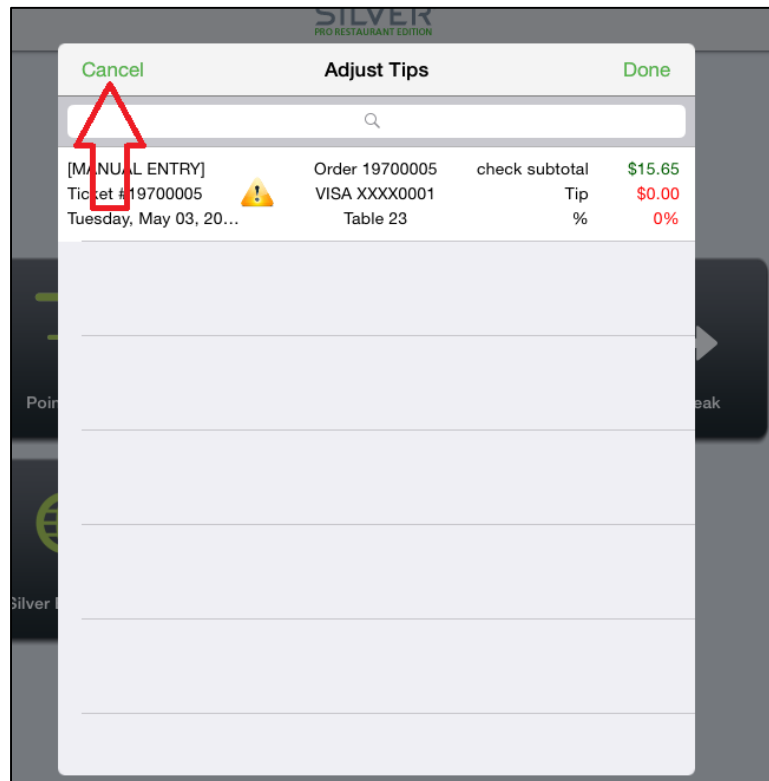
To allow manual card entry for EMV:

1. In Silver Back Office, select **Settings > Payments**.
2. Under 'Integrated Credit,' select **Allow Manual Card Entry**.
3. Click **Save**.

## Ability to Cancel End Shift When Adjusting Tips

### Overview

In previous versions, once an employee selected End Shift to end their financial shift and chose the option to Adjust Tips, there was no option to cancel out of the process. For example, if Sarah Server ended her financial shift but forgot to adjust her credit card tips, there was not a way for her to cancel the ending of her shift and enter her tips. Sarah would have to end her financial shift, have a manager reopen her financial shift, adjust her tips, and then close her shift for the evening. In 3.11, we've added a cancel button to allow employees to stop the end shift process.



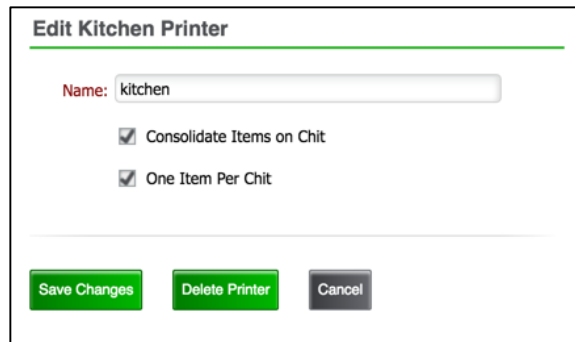
# Kitchen Chits: Print One Item Per Chit

## Overview

Starting in v3.11, Silver Pro now provides an option for stores to print one item per kitchen chit. Previously, all items on a ticket assigned to a kitchen printer printed on the same kitchen chit. This is helpful in some operations that make individual items for delivery or takeout such as sandwiches or pizza. Using pizza as an example, it can be helpful if the pizza maker only sees 1 pizza per chit whereas the expeditor printer could have all items together on the expo ticket.

This is a printer setting and must be set in Silver Back Office at the store level for each printer.

1. In Silver Back Office, select **Settings > Kitchen Routing**.
2. Select the **printer** for which you want to have one item print per chit.

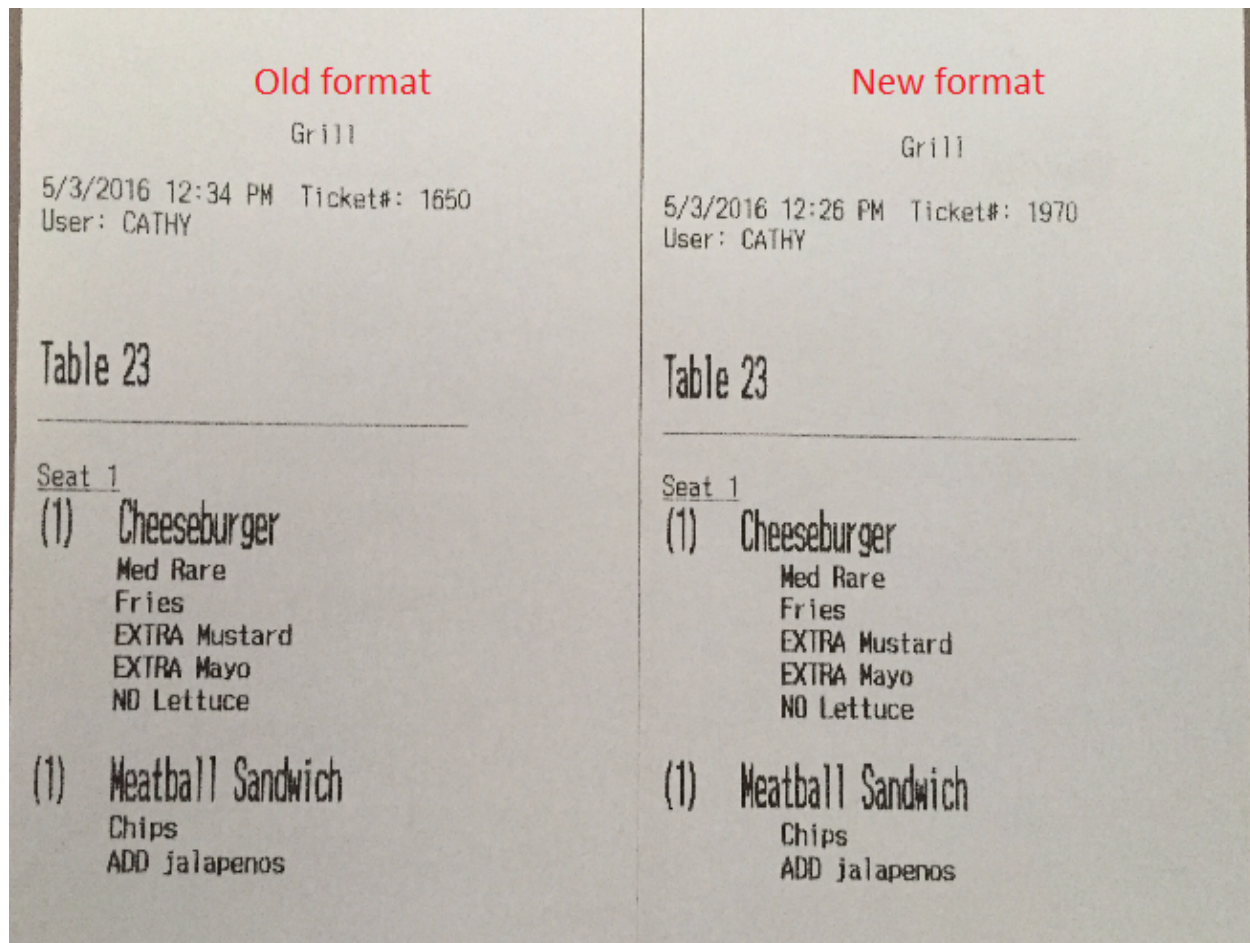


3. Select **One item per chit**.
4. Click **Save Changes**.

# Kitchen Chits: Added Leading Spaces for Modifier Indentation on Kitchen Chits

## Overview

We've added leading spaces for modifiers on kitchen chits to make it easier for kitchen staff to differentiate parent menu items and modifier items.

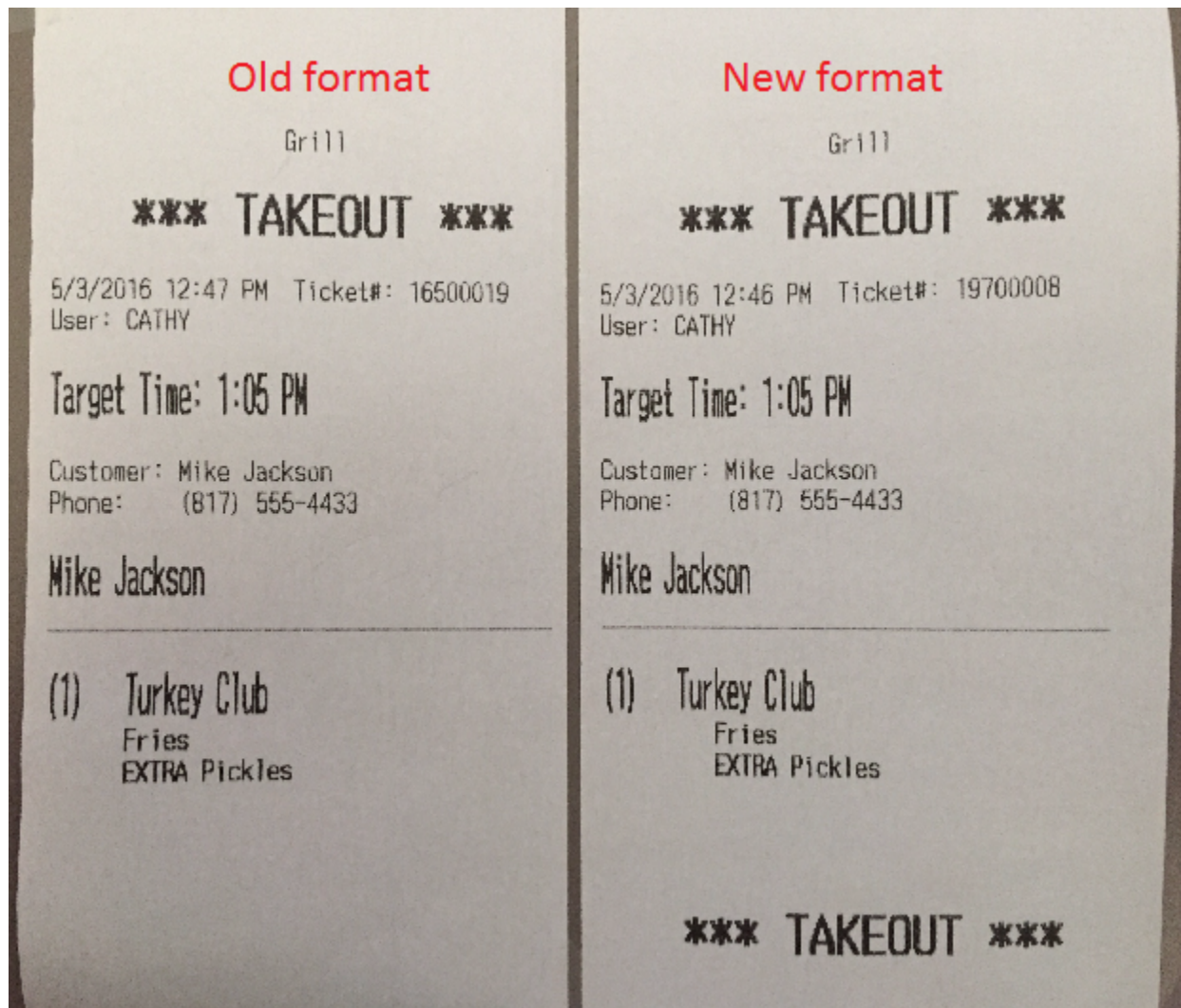




## Kitchen Chits: Print **\*\*TAKEOUT\*\*** At The Top and Bottom

### Overview

Beginning in v3.11, when you select the Takeout order mode, TAKEOUT will print at the top and bottom of the kitchen receipt. Previously, TAKEOUT only printed at the top.



# Option to Suppress Non-Priced Modifiers From Guest Check

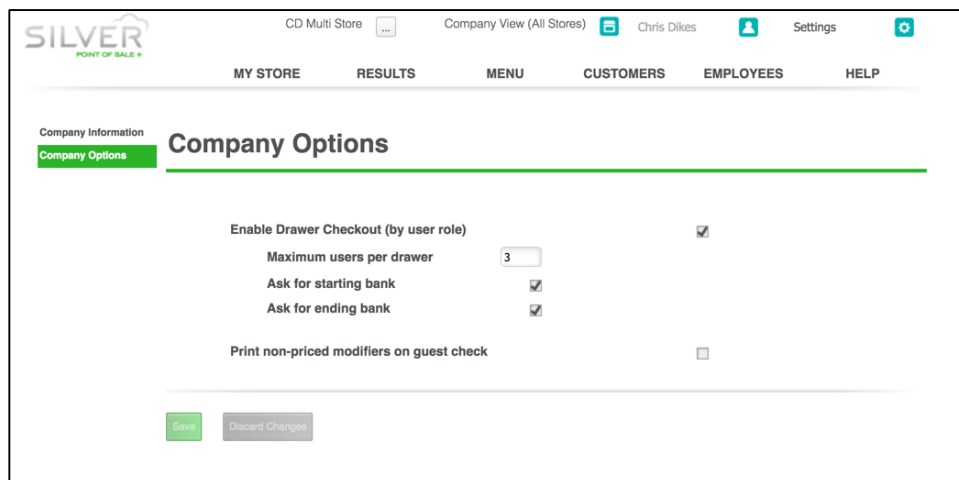
## Overview

Previously, both priced and non-priced modifiers printed on the guest check. In some cases, this could lead to lengthy customer receipts printing. We've now added an option to suppress non-priced modifiers from printing on the guest check.

By default, printing non-priced modifiers on the guest check is turned on. If you do not want non-priced modifiers to print, you must clear the selection.

This setting is a company setting.

1. In Silver Back Office, tap **Settings > Company Information**.
2. Tap **Company Options**.



The screenshot shows the Silver Back Office interface. At the top, there's a header with the Silver logo and navigation links: CD Multi Store, Company View (All Stores), Chris Dikes, and Settings. Below the header is a menu bar with options: MY STORE, RESULTS, MENU, CUSTOMERS, EMPLOYEES, and HELP. The main content area is titled 'Company Options' and contains several settings:

- Enable Drawer Checkout (by user role)**: A checkbox that is checked.
- Maximum users per drawer**: A text input field with the value '3'.
- Ask for starting bank**: A checkbox that is checked.
- Ask for ending bank**: A checkbox that is checked.
- Print non-priced modifiers on guest check**: A checkbox that is unchecked.

At the bottom of the settings area, there are two buttons: 'Save' (green) and 'Discard Changes' (grey).

3. Clear **Print non-priced modifiers on guest check**.
4. Click **Save**.