

# **Silver Commerce User Help Guide Retail Mode**

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## Getting Started with Silver Commerce

Silver Commerce is an e-commerce (think web store) tool that is fully integrated to your NCR Silver POS and Back Office. It is designed to help you quickly launch an e-commerce store. It is easy to manage, and does not require a web developer or third party to use.

How do you get started? Log into the NCR Silver Back Office and click on the **E-COMMERCE** tab.

## Getting Started Checklist

There are a few steps you need to be sure to complete when setting up Silver Commerce.

- Set up your content
  - o You will need images for online categories and products.
  - o Plan how you will name things like online navigation categories and product names. You might want these to be different than items appear on a POS.
  - o Prepare an online description for your categories and products that gives customers the important information or specifications about the product.
  - o A banner for your website
- If you are brand new to NCR Silver, be sure you have set a credit card processor and have provided the proper information to NCR Customer Care. This will ensure you can take credit card payments to sell online.
  - o If you are not on an NCR Secure Pay processor, you will need to set up stripe
- Know what methods of shipping you want use and the shipping prices you will offer customers
- Prepare a set of Terms and Conditions as well as a Privacy Policy
- Think about what you want your website navigation to be

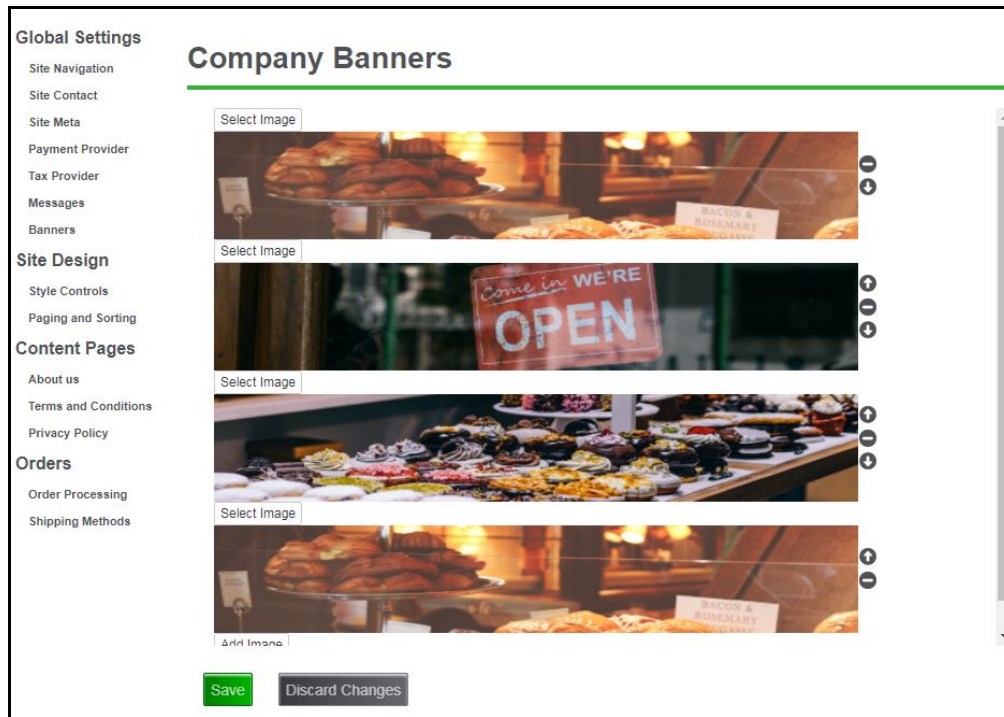
## Adding Banners

You can add multiple banners to your commerce site to display various aspects of your products or business to your customers. Banners will carousel automatically or be clicked through by the customer.

1. Log into the Silver Back Office and click on **E-commerce**
2. Click **Banners** from the menu on the left
3. Click **Add Image** and select an image file to upload. Banners recommended 1600x350 pixels in size.

## Silver Commerce Getting Started with Retail Mode

- When more than one banner is added, use the “-” minus icon to delete a banner or use the arrows to reposition them into the order in which you want them to appear. The banners display in descending order with the image at the top of the list appearing first.

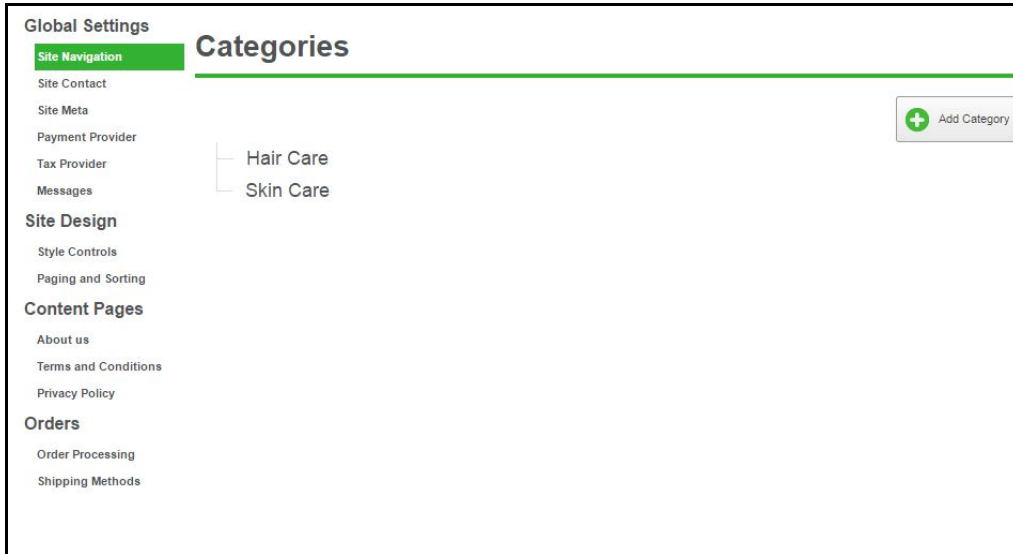


## Setting Up Site Navigation Categories

Categories in Silver Commerce are different than categories for your POS menu. In Silver Commerce, Categories are created to help your customers navigate your e-commerce store.

To set up your categories for Silver Commerce:

- Log into the Silver Back Office and click on **E-commerce**
- Click **Site Navigation** from the menu on the left



3. Click the **+ Add Category** in the right corner to add a new category.
4. Enter the following information:

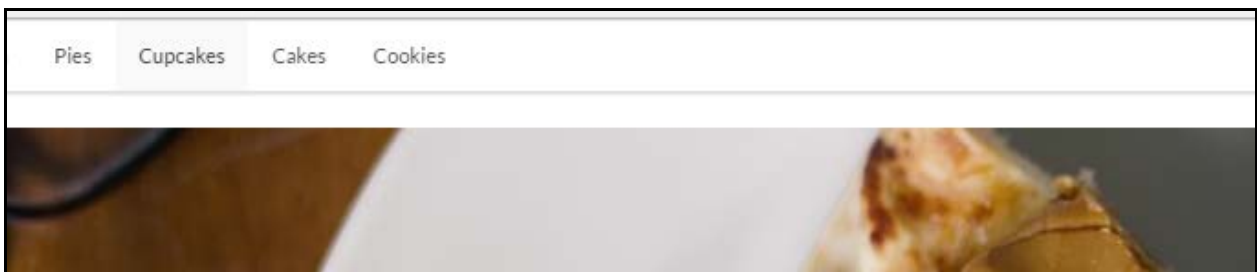
A screenshot of the "Category" form in the Silver Commerce administration interface. The form contains the following fields: "Title\*" (text input with placeholder "title"), "Full Title" (text input with placeholder "full title"), "Description" (text input with placeholder "description"), "Active" (checkbox checked), "Image\*" (button labeled "Select Image"), "Category Assignment" (dropdown menu with "Top" selected), "Search Engine Content" section with "Meta Title" (text input with placeholder "meta title"), "Meta Keywords" (text input with placeholder "meta keywords"), and "Meta Description" (text input with placeholder "meta description"). At the bottom left are two buttons: "Add" (green) and "Cancel" (grey).

- You will have the option to mark as active or inactive to assist with availability or specials (like a sales category).

Note: When you are ready, you can leave **items** listed as “active” but leave a **navigation category** “inactive.” This means you wont have to go through and activate/deactivate each individual item.

## Silver Commerce Getting Started with Retail Mode

- You can create a sub-category by selecting an existing category in the **Category Assignment**.
  - Click Select **Image** to load an image that has previously been saved on your device's hard drive.
5. You will also have the option to include **Meta Data**, which are additional descriptions and keywords coded into your web page but do not appear anywhere on your page.
- Meta data helps web search engines recognize your page so that when customers make a search, your page will appear higher on the list of the results.
  - Enter a Meta Title, Keywords and Description
6. Click **Add** to create the category.



\*\*Image above shows categories on Silver Commerce test site\*\*

## Setting Up Silver Commerce Site Contact

It is important to set up your **Site Contact** in Silver Commerce so that customers have a way of communicating with you when needed. This information will appear in a contact section of your e-commerce store. To enter site contact information:

1. Log into NCR Silver Back Office and click the **E-commerce** tab
2. Click **Site Contact** from the menu on the left
3. Enter the following information:

**Company Contact**

Company Name\* Steve's Beauty Shoppe

Country\* United States

Address 1\* address1

Address 2 address2

City\* Alpharetta

State/Region\* Georgia

Postal Code\* 30022

Main Phone Number xxxxxxxxxx

Main Email Address\* @ email@email.com

Customer Support Phone Number xxxxxxxxxx

Customer Support Email Address @ support@email.com

- Company Name - This is your identity, it should match your official store name
- Main Phone Number: We suggest using a store or company number that is frequently used
- Main E-mail Address: We suggest using a store or company e-mail address
- If available, you can enter an alternate customer care number and e-mail address that is used specifically for customer interaction, like order returns.

4. Click Save

## Setting Up Items for Silver Commerce

Because Silver Commerce is fully integrated with the NCR Silver system, you use your existing Silver Back Office items in your web store. There is a section in our extended item setup dedicated to online selling information so that you can customize the way items appear online versus on POS.

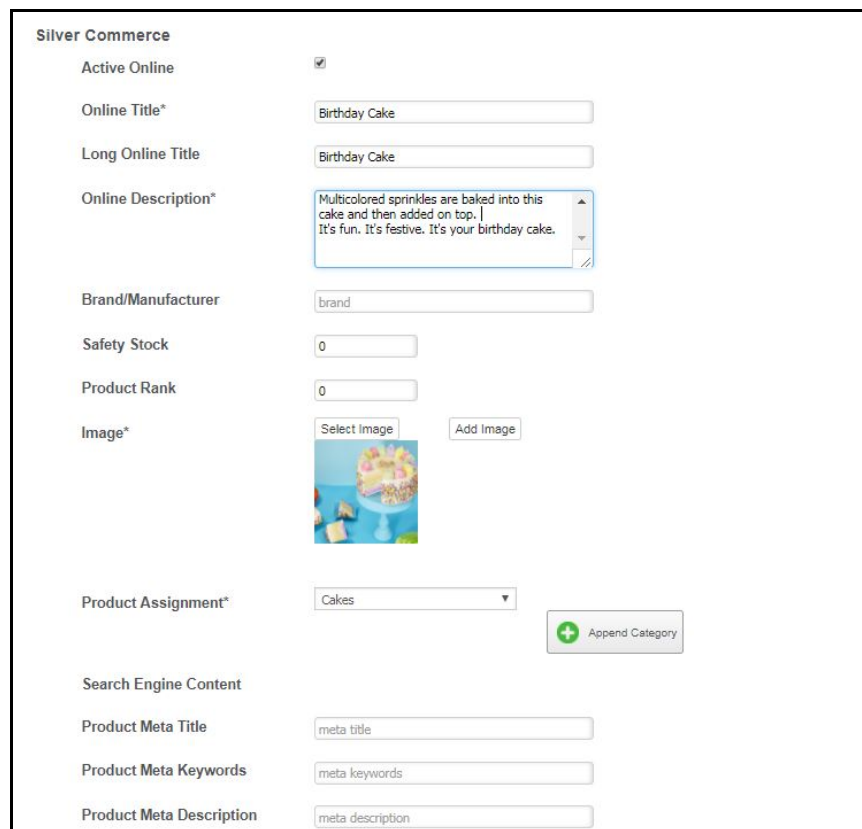
Before you start:

- Make sure your inventory for the POS is already set up in the Back Office
- Create your Silver Commerce categories - these will determine how your customers navigate your e-commerce store
- Get some good images of your products

## Silver Commerce Getting Started with Retail Mode

To add an item to your Silver Commerce store:

1. Log into the NCR Silver Back Office
2. Click on the **Inventory** Tab
3. Click on the category for the item you need, or use the search bar to find the item.
4. Click on the item you want to link to an e-commerce category
  - Note that editing item details is restricted by user role
5. If not already in use, click **Extended Item Setup**, and several new fields will appear.



The screenshot shows the 'Silver Commerce' configuration page for a 'Birthday Cake'. The form includes the following fields and options:

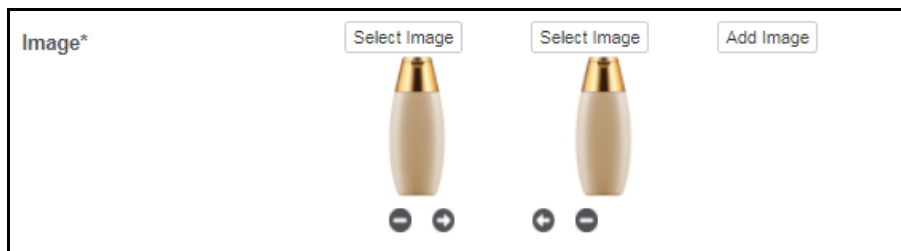
- Active Online:** A checked checkbox.
- Online Title\*:** A text input field containing 'Birthday Cake'.
- Long Online Title:** A text input field containing 'Birthday Cake'.
- Online Description\*:** A text area containing the text: 'Multicolored sprinkles are baked into this cake and then added on top. It's fun. It's festive. It's your birthday cake.'
- Brand/Manufacturer:** A text input field containing 'brand'.
- Safety Stock:** A numeric input field containing '0'.
- Product Rank:** A numeric input field containing '0'.
- Image\*:** A section with a 'Select Image' button, an 'Add Image' button, and a small image of a birthday cake.
- Product Assignment\*:** A dropdown menu currently set to 'Cakes', with an 'Append Category' button (a green plus sign in a circle) to its right.
- Search Engine Content:** A section with three text input fields:
  - Product Meta Title:** containing 'meta title'
  - Product Meta Keywords:** containing 'meta keywords'
  - Product Meta Description:** containing 'meta description'

6. Enter the following information:
  - **Online Title:** The display name of the item when used in Silver Commerce. This is a required field that appears within the categories of your customer facing webstore as well as on orders and receipts.
  - **Long Online Title:** An optional longer name displays on the item detail page of your customer facing website.



## Silver Commerce Help

- Online Description
  - Brand/Manufacturer
  - The amount of Safety Stock you of this product you have
  - A Product Rank. Product Rank is used to ensure customers are seeing the products you want them to. If a product has rank “1” it will always appear at the top of your commerce site, even if your customer changes the sort order of the page they are viewing.
7. Click **Select Image** to upload an image that was previously saved to your device's hard drive. Images are required. We suggest getting the highest quality photos possible for product images.
- You can upload multiple, alternate images and select a default to appear on the product page. When more than one image is uploaded, click **Select Image** to replace an existing image.
  - Press the “-” minus icon to delete an image and press the arrows to set the order in which they should appear. The first image (from left to right) will appear as the default on the product page.

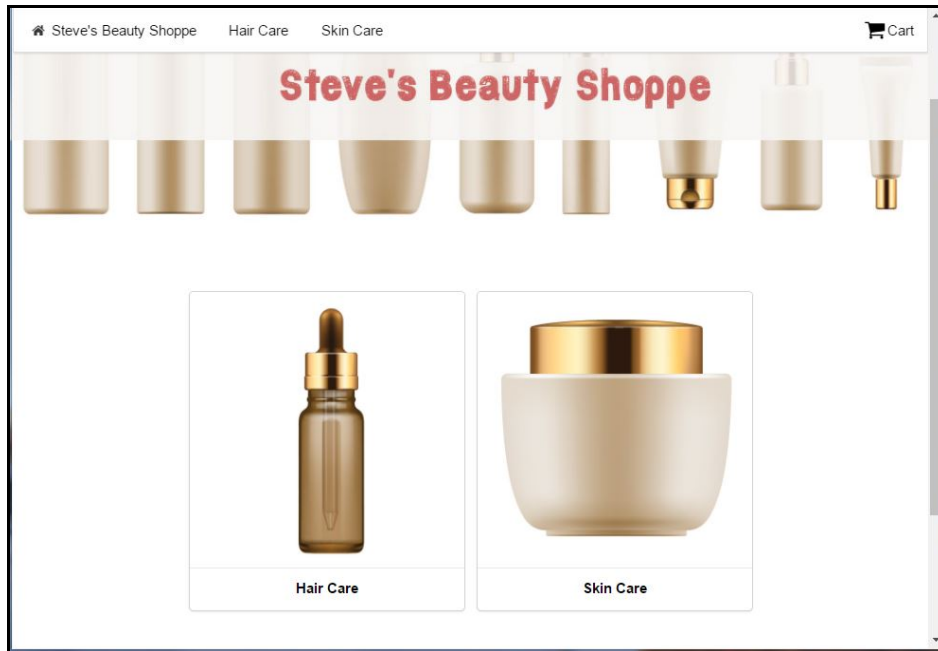


8. Click **+Applied Category** and a drop down field of your Silver Commerce categories will appear. Select the desired category. You can add more than one category for an item to appear in.
9. You can enter additional keywords and descriptions known as Meta Data that will help your e-commerce site appear on search engines, like Google. This does not appear on your e-commerce page. Enter the following:
- Product Meta Title
  - Product Meta Keywords
  - Product Meta Description
10. Enter a **Safety Stock** amount. If you run out of your safety stock, the item will be changed to “out of stock” on your webpage.

Note: Safety stock is designed to help merchants who use one stock pool to sell items in store and online and can help you avoid selling an item online when you are out of stock.

11. Click **Save** and items will appear on your E-commerce site.

## Silver Commerce Getting Started with Retail Mode



\*\*Image above shows items displaying in Silver Commerce test site\*\*

NOTE: When creating a new item, you will need to enter the required information for the item, in addition to the extended item details for Silver Commerce. You can un-flag POS availability in the event that you need to sell an item online but not on the POS.

### In-Stock and Out of Stock Messages in Silver Commerce

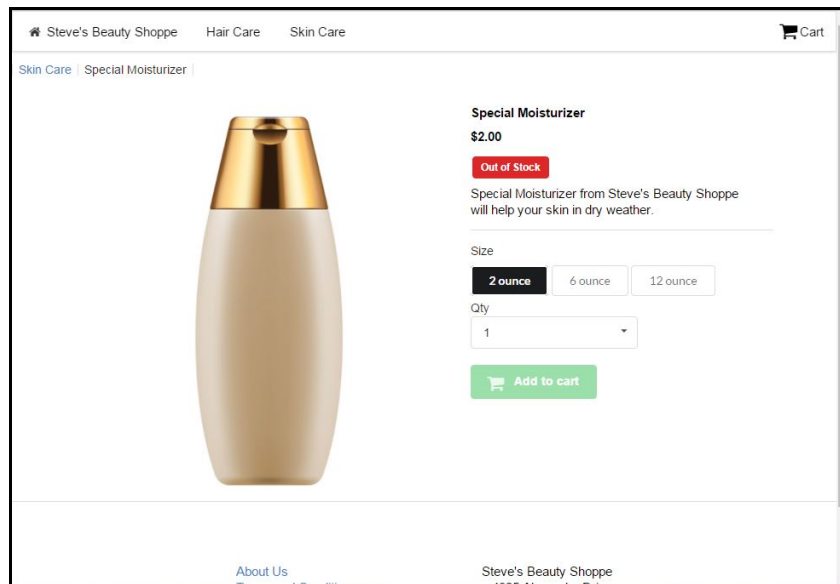
Silver Commerce gives you the option to include a message in stock and out of stock items to help set your customers' expectations about when the product will ship. To set up messaging:

1. Log into NCR Silver Back Office and click the **Ecommerce** tab
2. Click **Messaging** from the menu

## Silver Commerce Help

The screenshot shows the 'Messages' configuration page in the Silver Commerce back office. The top navigation bar includes 'MY STORE', 'RESULTS', 'INVENTORY', 'CUSTOMERS', 'EMPLOYEES', 'ECOMMERCE', and 'HELP'. The left sidebar lists various settings categories: Global Settings (Site Navigation, Site Contact, Site Meta, Payment Provider, Tax Provider, Messages), Site Design (Style Controls, Paging and Sorting), Content Pages (About us, Terms and Conditions, Privacy Policy), and Orders (Order Processing, Shipping Methods). The main content area is titled 'Messages' and contains two text input fields: 'In Stock Ship Message' with the value 'In Stock' and 'Out of Stock Ship Message' with the value 'Out of Stock'. Below these fields are two buttons: a green 'Save' button and a grey 'Discard Changes' button.

3. Enter your message in both of the available fields.
4. Click **Save**. You will see the message displayed on your customer facing commerce page.



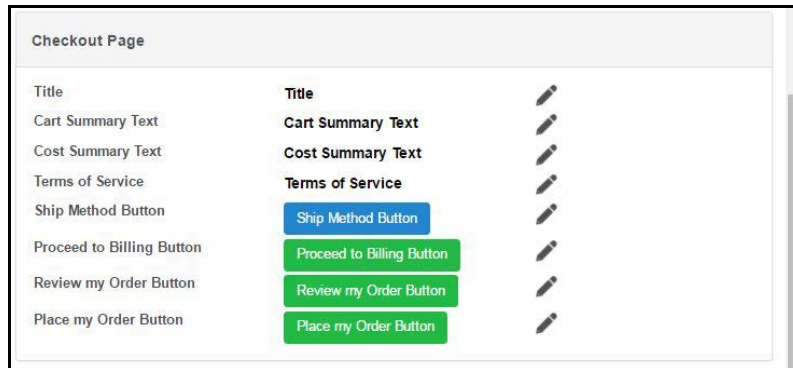
## Understanding Style Controls

Style controls make it easy for you to customize the template used for the design of customer facing website. To edit the style of your Silver Commerce site:

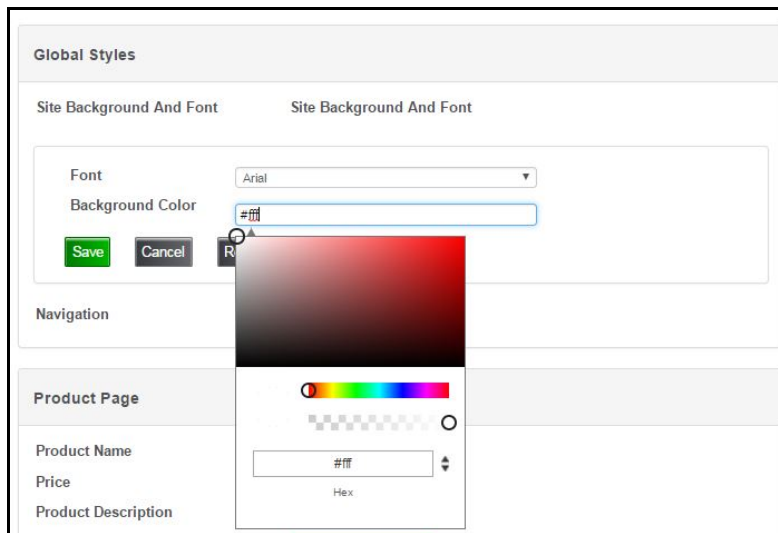
1. Log into the NCR Silver Back Office and click the **Ecommerce** tab.
2. Click **Style Controls** under the Site Design section of the menu.

## Silver Commerce Getting Started with Retail Mode

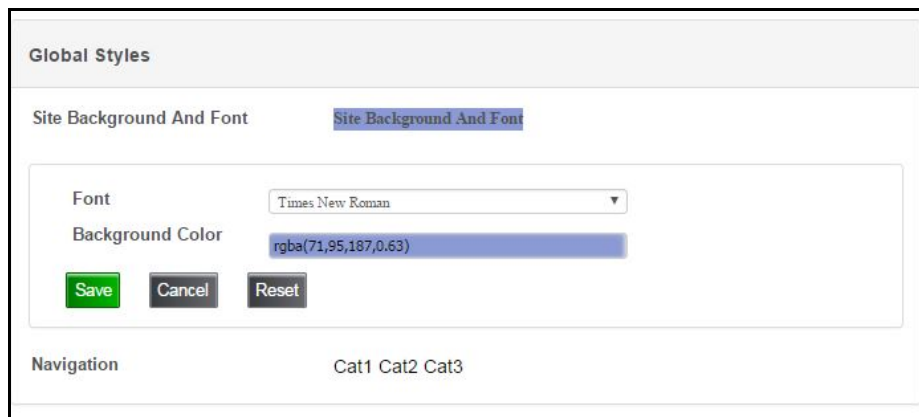
You will have control over **font, font color, font size, button color, and background color**. The editable options on the style page will appear in the style in they are set to (see below for more images)



You can click the pencil-shaped edit icon to make changes to what is available. Dropdown menus on the page allow you to change the look and feel of all editable options.



The changes will appear in the back office screen for you to preview. **Click save** to put the changes into effect.





Note: Once saved, your changes go into effect immediately. If you have your customer facing website open while editing styles in the back office, you will need to refresh the page to see any changes made.

### List of Editable Style Controls






## Style Controls

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#### Global Styles

Site Background And Font	Site Background And Font	
Navigation	Cat1 Cat2 Cat3	

#### Product Page

Product Name	Product Name	
Price	Price	
Product Description	Product Description	
Add To Cart Button		

#### Shopping Cart

Header	Header	
Price	Price	
Order Summary	Order Summary	
Proceed to Checkout Button		

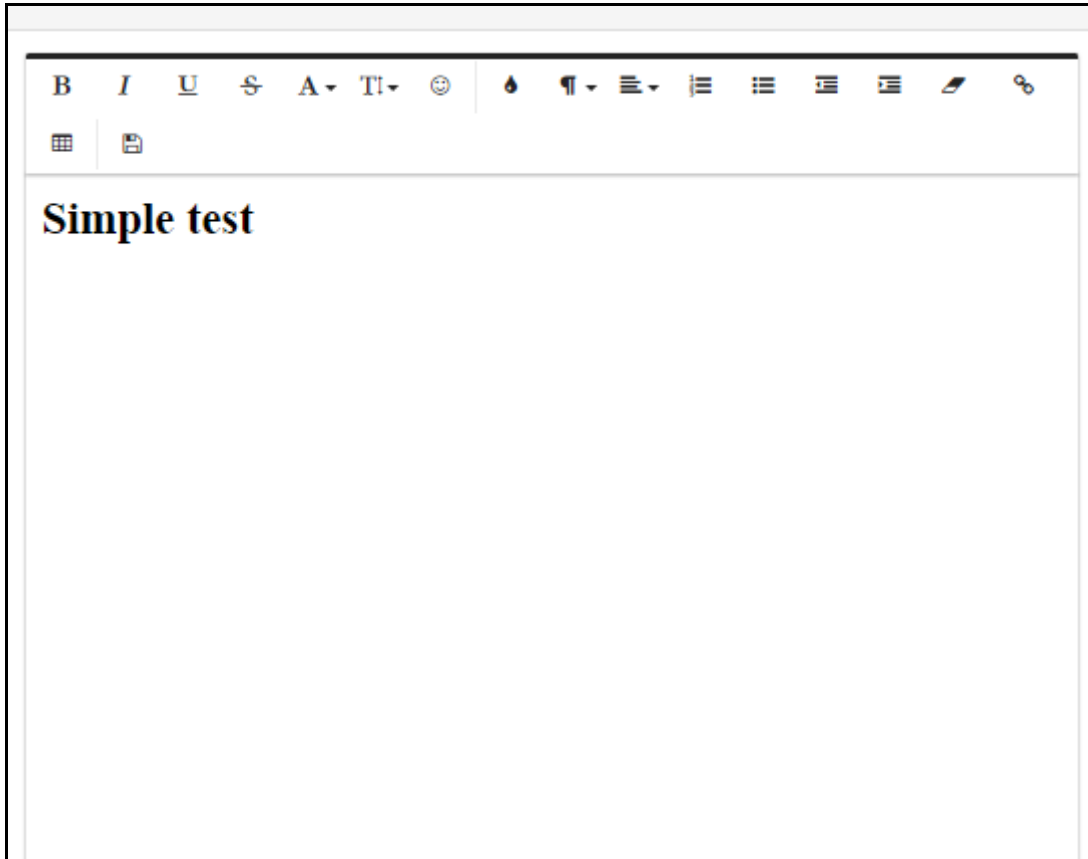
The screenshot displays the Silver Commerce template editor interface. It is divided into two main sections: 'Checkout Page' and 'Thank You Page'. Each section contains a list of elements that can be edited, with a preview of the element and an edit icon (pencil) to its right. The 'Checkout Page' section includes: Title, Cart Summary Text, Cost Summary Text, Terms of Service, Ship Method Button (a blue button), Proceed to Billing Button (a green button), Review my Order Button (a green button), and Place my Order Button (a green button). The 'Thank You Page' section includes: Thank You and Continue Shopping Button (a blue button). At the bottom left of the editor, there is a 'Reset Template' button.

## Setting Up Your Additional Content Pages

You can edit your own **About Us**, **Terms and Conditions** and **Privacy Policy** pages to provide your customers with important information about your business.

To edit these pages:

1. Log into NCR Silver Back Office and click the **E-commerce** tab.
2. Click **About Us**, **Terms and Conditions** or **Privacy Policy** from the menu on the left.
3. Enter your terms and conditions into the text edit field.
  - The text editor will show a red underline with misspelled words



4. The text editor includes a tool bar with additional functions. Hover your cursor over each icon to see what the function is. The tool bar includes:

- Standard text formatting options like size, bold, italics, strike through, font and underline
- Color options
- Paragraph formatting and alignment
- Insert table
- Ability to upload an image
- Ability to insert hyper links
- undo/redo option
- Emoticons

5. Click save and your Terms and Conditions page on your E-commerce site will update.

NOTE: NCR is not responsible for creating and deciding on your Privacy Policy.

## Managing Shipping Methods in Silver Commerce

You can manage your shipping methods in Silver Commerce to give you customers multiple shipping options. For example, you might want to offer Standard, Priority and Express shipping options and charge a different amount for each.

### To set up a new shipping method:

1. Log into the NCR Silver Back Office and click on the **E-commerce** tab
2. Click **Shipping Methods** from the menu on the left
3. Click the "+" icon to add a new shipping method
4. Enter the shipping method name and price
  - This is the price customers pay for selecting the shipping method to fulfil their online order
5. If it is the default shipping method, click the box to mark as default.
6. Click **Save**. Clicking the "-" icon or cancel will cancel the entry.

The screenshot displays the 'Shipping Methods' configuration page in the Silver Commerce back office. The top navigation bar includes 'MY STORE', 'RESULTS', 'INVENTORY', 'CUSTOMERS', 'EMPLOYEES', 'ECOMMERCE', and 'HELP'. The left sidebar contains various settings categories like 'Global Settings', 'Site Design', 'Content Pages', and 'Orders'. The main content area shows a table of shipping methods with the following data:

Name	Price	Default	Is Active		
Standard Shipping	\$5.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
Overnight Shipping	\$30.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	+	-

Below the table, there are 'Save' and 'Discard Changes' buttons.

### To edit existing shipping methods:

1. Click on the pencil icon to unlock the editing fields.

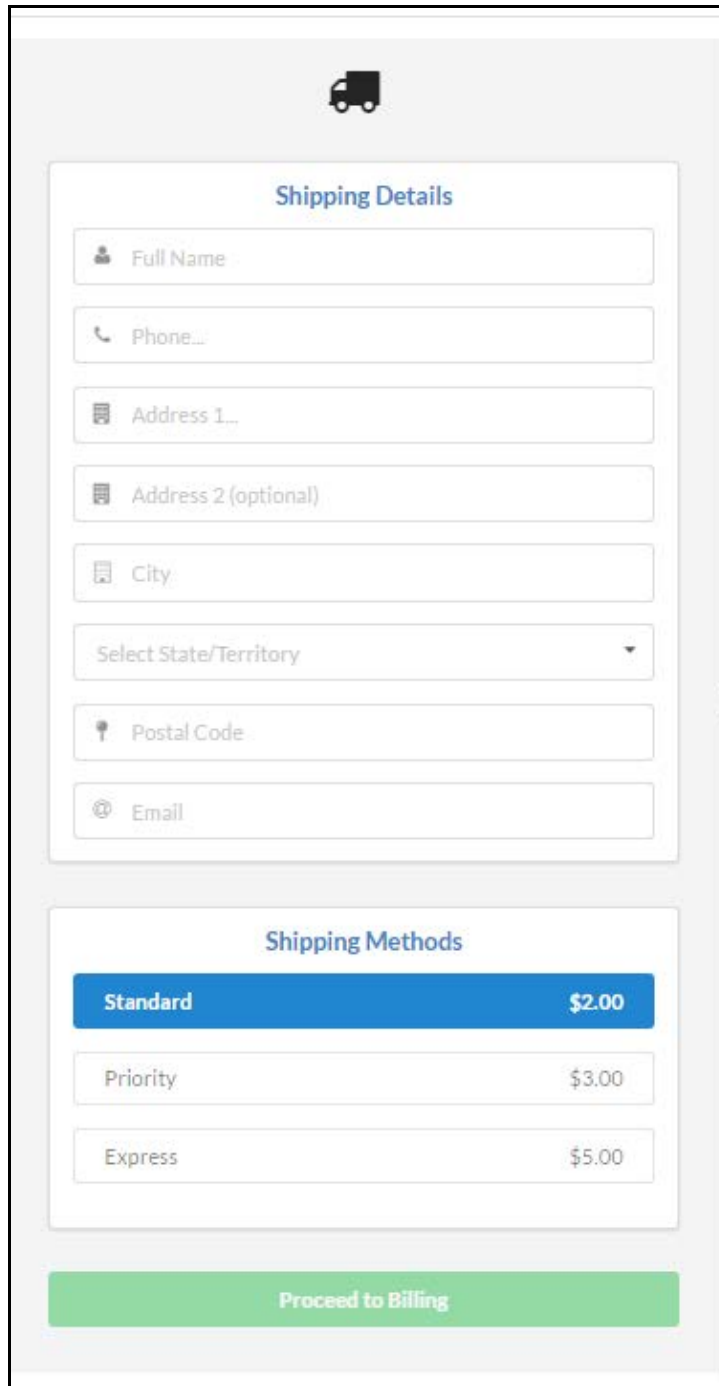


## Silver Commerce Help

2. Click on the field you wish to edit, and make your changes.
  - You do not need to click the pencil to make changes to default and active check boxes
3. You can change the order in which shipping methods appear by clicking the up and down arrows to the right of the shipping method.
4. Click Save

Your shipping methods appear during the checkout process for your customers.

## Silver Commerce Getting Started with Retail Mode



The image shows a user interface for shipping details. At the top, there is a truck icon. Below it is a section titled "Shipping Details" containing several input fields: "Full Name", "Phone...", "Address 1...", "Address 2 (optional)", "City", "Select State/Territory" (a dropdown menu), "Postal Code", and "Email". Below this section is another section titled "Shipping Methods" which displays three options: "Standard" for \$2.00, "Priority" for \$3.00, and "Express" for \$5.00. The "Standard" option is highlighted with a blue background. At the bottom of the form is a green button labeled "Proceed to Billing".

Shipping Methods	
Standard	\$2.00
Priority	\$3.00
Express	\$5.00



## Processing Silver Commerce Orders

You can monitor and change status, edit shipping information, and view details of orders in the back office. This makes it easy to find specific orders and move specific orders through the fulfilment process.

Note: The customer's credit card will not be charged until you change the status to **Shipped** in order processing.

## Open Orders

1. Log into the NCR Silver Back Office and click on the **E-commerce** tab
2. Click on **Orders** from the menu on the left. You will see a list of **pending** open orders sorted from oldest to newest that includes the following details:

Orders						
Search: <input type="text"/>		From Date: 01/13/2017 	To Date: 02/10/2017 	Status: Pending ▼		
Customer Name	Email	Order Date	City	State	Telephone	Order Number
Nick Jenkins	nick@testnrc.com	Jan 13, 2017 1:19PM	Atlanta	GA		20170113181943798
S D	email@email.com	Jan 23, 2017 4:14PM	atlanta	GA		20170123211428728
elizabeth jenkins	test@nortest.com	Jan 25, 2017 4:18PM	Alpharetta	GA		20170125211630773
F N	test@dummy.com	Jan 31, 2017 7:58AM	Atlanta	GA		20170131125645741

- Customer name
  - E-mail
  - Order date
  - City
  - State
  - Telephone number
  - Order number
3. Type keywords into the search box to filter results that contain your search
  4. You can click the pencil icon to edit the date range by using the calendar
  5. You can also filter options by status - pending, fulfilled or canceled

6. Double click on an order to view more details.

### Viewing Order Details and Changing Status

**Order #**  
20170131125645741

Order: Feb 15, 2017 4:26PM  
Date:

Status: Pending

---

**Billing Information**

F N

test add1add 2  
Atlanta  
USA  
GA  
30022

**Shipping Information**

F N

test@dummy.com  
test add1add 2  
Atlanta  
USA  
GA  
30022

---

Sku	Title	QTY	Price	Total Price
10043	Chocolate Cake	4	\$24.50	\$98.00

Subtotal: \$98.00

Tax: \$7.07

Shipping Cost: \$3.00

Total: \$108.07

Finalize order Cancel

1. View and edit **Order Status**

- To change order status, click the drop down menu and select from pending, shipped or canceled.

Note: Customers are not charged for an order until the order status is changed to **shipped** and you have finalized the order.

2. Click the printer icon to print the order details
3. View Billing Information

4. View Shipping Information

- Click the pencil icon to edit shipping info
- click the printer icon to print shipping details in a normal US letter format

5. View order details

- includes sku, item name (title), quantity ordered, unit price and total price for each line item.
- You will also see subtotals for entire order, tax, shipping and total cost.

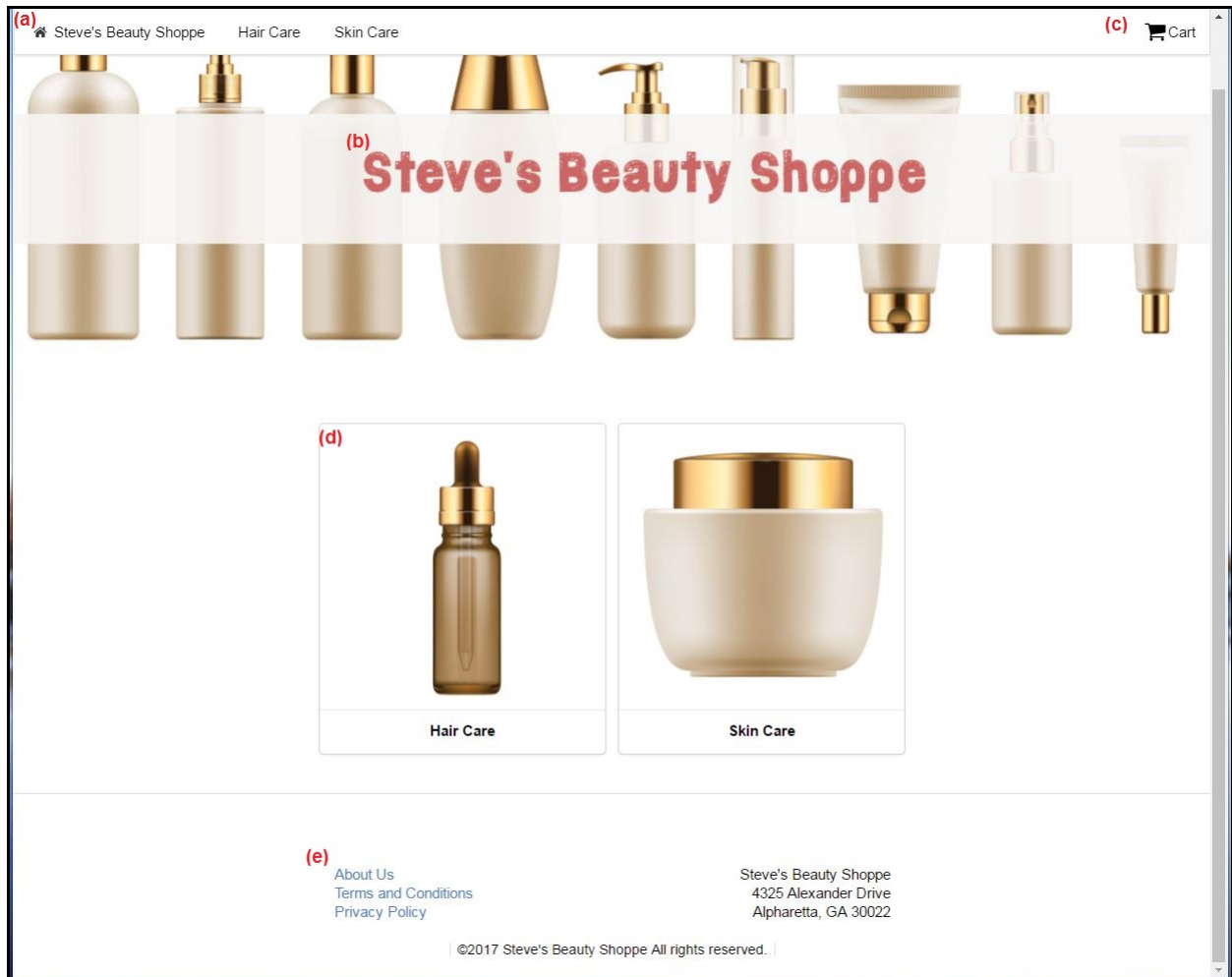
6. When an order has shipped and arrives to a customer, click **Finalize Order**. This will move the order to the **Fulfilled** category.

Note: Once an order is changed to **shipped** and you click **finalize order**, you cannot cancel or make further changes. Clicking **Finalize Order** is the same as clicking save for all other order statuses.

NOTE: Clicking the **cancel** button in the bottom right of the page will return you to the **order** page and discard any changes. Clicking this button DOES NOT cancel the order you are viewing. To cancel an order:

1. Change the order status to cancel.
2. Click **finalize order**.
3. The customer will not be charged.

## Silver Commerce Web Store - Home Page



**(a)** Navigation

**(b)** Store Name - this is what you entered into your site contact information in E-commerce section of Silver Back Office

**(c)** Shopping Cart

**(d)** Categories with images and names

**(e)** Content pages

- About Us
- Terms and Conditions
- Privacy Policy

## Category Page – Silver Commerce Web Store

The Category page features all of the same navigation and content links as your home page, but will show all items within a category with their item names.

The screenshot shows a web store interface for 'Steve's Beauty Shoppe'. The navigation bar includes 'Home', 'Hair Care', and 'Skin Care', with a shopping cart icon on the right. The 'Skin Care' category is selected, and a 'Sort By: Price: Low to High' dropdown menu is visible. The main content area features a single product listing for 'Special Moisturizer', which is a beige bottle with a gold cap, priced at \$3.00. The footer contains links for 'About Us', 'Terms and Conditions', and 'Privacy Policy', along with the store's address: 'Steve's Beauty Shoppe, 4325 Alexander Drive, Alpharetta, GA 30022'. A copyright notice for 2017 is also present.

## Item Detail Page - Silver Commerce Web Store

(a) Steve's Beauty Shoppe   Hair Care   Skin Care   (b) Cart

Skin Care | Special Moisturizer |

(c)

(d)

(e) **Special Moisturizer**  
\$2.00  
**Out of Stock**  
Special Moisturizer from Steve's Beauty Shoppe will help your skin in dry weather.

(f) Size  
**2 ounce**   6 ounce   12 ounce  
Qty  
1

(g) **Add to cart**

About Us  
Terms and Conditions  
Privacy Policy

Steve's Beauty Shoppe  
4325 Alexander Drive  
Alpharetta, GA 30022

©2017 Steve's Beauty Shoppe All rights reserved.

(a) Navigation

(b) Shopping cart

(c) Navigation breadcrumbs (allows you to quickly navigate back to the category)

(d) Item Image

(e) Item details

- name
- description
- price
- in/out stock



(f) Item variations



(g) Cart with notifications

Viewing the Shopping Cart - Silver Commerce Web Store

The screenshot shows a shopping cart page for 'Steve's Beauty Shoppe'. The page includes a navigation bar with 'Hair Care' and 'Skin Care' links, a shopping cart icon with a '2' badge, and a table of items. The items are 'Special Moisturizer' in 6 ounce and 12 ounce sizes. A summary table shows a subtotal of \$10.00, tax of \$0.00, shipping cost of \$0.00, and an order total of \$10.00. A 'Proceed to Checkout' button is visible at the bottom right. The footer contains links for 'About Us', 'Terms and Conditions', and 'Privacy Policy', along with the store's address and a copyright notice.

Product	Price	Quantity	Total
 <b>Special Moisturizer</b> Size: 6 ounce	\$4.00	1	\$4.00
 <b>Special Moisturizer</b> Size: 12 ounce	\$6.00	1	\$6.00

Subtotal	\$10.00
Tax	\$0.00
Shipping Cost	\$0.00
Order Total	\$10.00

[About Us](#)  
[Terms and Conditions](#)  
[Privacy Policy](#)

Steve's Beauty Shoppe  
 4325 Alexander Drive  
 Alpharetta, GA 30022

©2017 Steve's Beauty Shoppe All rights reserved.

(a) Navigation

(b) Shopping cart (with badge for number of items in cart)

(c) Cart details

- Product name

## Silver Commerce Getting Started with Retail Mode

- Price
- Adjustable quantity
- Total

(d) Checkout totals

(e) Proceed to checkout button

### Checkout Screen - Silver Commerce Web Store

Customers follow a simple three-step checkout process. As they click through and confirm each step, the next section will become editable.

The screenshot displays the checkout interface for 'Steve's Beauty Shoppe'. The navigation bar includes 'Hair Care' and 'Skin Care' links, and a cart icon with a '2' badge. The main content is divided into three columns:

- Shipping Details:** Includes fields for Full Name, Phone, Address 1, Address 2, City, Select State, Postal Code, and Email. Below this is the **Shipping Methods** section with 'Standard Shipping' at \$5.00 and 'Overnight Shipping' at \$30.00. A 'Proceed to Billing' button is at the bottom.
- Payment Details:** Includes fields for Name on Card, Card Number, Expiration Date, and CVC. Below this is the **Billing Details** section with a 'Different Billing Address' toggle and a 'Review My Order' button.
- Cart Summary:** A table showing two items: 'Special Moisturizer' at \$4.00 each and another 'Special Moisturizer' at \$6.00 each. Below this is the **Cost Summary** table and a 'Place my order' button.

Product	Price	Qty	Total
Special Moisturizer	\$4.00	1	\$4.00
Special Moisturizer	\$6.00	1	\$6.00

Subtotal	\$10.00
Tax	\$0.00
Shipping Cost	\$0.00
Order Total	\$10.00

## Find Locations Page

Commerce will generate a Find Locations page to make it fast and easy for your customers to find your stores. Your commerce store will automatically identify a customer's location (based on their web browser's preferences) to associate them with the closest store. Here, they can also search for locations, see a list of location addresses, view a map screen shots and link to driving directions.

Dev Silver Commerce   Coffee   Books   Music   Flowers   TEST\_C   MODS   Cart

Home | **Find Locations**

Zip code, address or city, state   Search  

### LOCATIONS NEAR YOU

	11300 Medlock Bridge Road Johns Creek GA, 30097	Distance 12.0 mi Driving Time 24 mins	<a href="#">Driving Directions</a>
	4325 Alexander Dr Alpharetta GA, 30022	Distance 15.9 mi Driving Time 34 mins	<a href="#">Driving Directions</a>