GETTING STARTED WITH THE NCR SILVER BACK OFFICE

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INTRODUCTION

Welcome to NCR Silver! Use this document to learn the basics of using the Back Office. For more detailed information, click the **HELP** link near the top-right corner of the screen in the Back Office and/or click the **Help** link on the main/home screen of the POS app. Clicking either of these links will open a browser window to our Silver Sidewalk. On Silver Sidewalk, you can browse all the articles using the links on the left side of the screen, and you can also use the search feature.

If you still need additional assistance, please call our Customer Care team at **877-270-3475**. We offer call support and live chat 24 hours/day, 7 days/week.

EMPLOYEES & USER ROLES

OVERVIEW

User roles provide a way to grant or limit access to certain features in both the POS app and the Back Office.

First, you define the user roles for your business and then you assign a user role to each of your employees. This will ensure that employees only access features/functions that you want them to access.

- If an employee has limited access to features in the Back Office, those features will be hidden from the employee.
- For most features on the POS, when a user tries to use a feature to which they don't have access, the system will alert the user and prompt them to enter the PIN of a user who does have access to continue.

SYSTEM "OUT-OF-THE-BOX" USER ROLES

There are five pre-defined user roles, and each one has a set of features assigned to it by default. However, you can customize the features available to each role based on how you run your business.

- Time Clock Only
  Designed for employees who will only use the POS device to clock in/out
- Cashier
  Designed for employees who ring up sales on the POS device, but do not access the Back Office
- Cashier Plus
  Designed for employees who need full access to all of the features on the POS device, as well as inventory management in the Back Office
- Store Manager
  Designed for managers who need full access to all of the features in the POS app and full access to the Back Office, with the exception of account setup, purchasing, and billing features
- Account Manager
  Designed for store owners who need full access to all of the features in the POS app and full access to the Back Office. Every account should have at least one employee assigned to this user role.

ADDING EMPLOYEES

To add an employee:

1. Select **EMPLOYEES > EMPLOYEES**.
2. Click **Add an Employee**. The system will display the **Employee Detail** screen.
3. Enter the **Employee Name**, **Short Name** (will be shown on reports and receipts). You can use initials, first name, last name, etc.), **Email Address** (required if the employee will have Back Office access), and **Phone** for the employee.

NOTE: You can optionally enter alphanumeric characters in the **Employee ID** field. We show this field on the Time Clock report, so you could enter a payroll ID to aid in payroll/accounting.

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4. Select the **User Role** field and select the user role for the employee. Click this link to learn more about user roles.
5. <u>Multi-Store Customers Only:</u> Click the **Assign Stores** button and select the stores where the employee will be working.
6. The screen will update the **Login Credentials** based on the user role you select. Complete the following information as designated by the user role:
   - Enter a **Back Office User name** for the employee, such as their email address.
   - Enter a unique 4-digit **PIN** for each employee who will need access to the POS app and/or just to clock in and out without access to other POS app functions. Remember to give the PIN to the employee.
   - Enter a Back Office **Password** and then enter it again in the **Confirm Password** box.
7. Click **Save Changes** to save the new employee record. Repeat these steps for each employee.

RESETTING AN EMPLOYEE'S BACK OFFICE PASSWORD

Back Office access is generally reserved for store owners, account managers, and other employees who should be allowed to view important sales data, maintain employee accounts, and edit inventory and customer information. However, please note that you can control exactly what a user can access in the Back Office based on their user role.

The Back Office **User Name** automatically defaults to the employee's **Email Address**, but you can set it to something else. Once you save the employee record, you cannot change the **User Name**. The system will send an email to employees with Back Office access, which will include their user name and temporary password. This email also includes a link to the Back Office login page.

1. Select **EMPLOYEES > EMPLOYEES**.
2. Select the employee from the list or search for the employee.
3. Click the **Reset Password** button. The system will reset the employee's Back Office password, display the new password on a popup screen, and email the new password to the employee. When the employee logs in to the Back Office using the new password, the system will prompt them to set up a new password for their account.

CHANGING AN EMPLOYEE'S PIN

When an employee loses or forgets their PIN, you can reset it for them. To do this:

1. Select **EMPLOYEES > EMPLOYEES**.
2. Select the employee from the list or search for the employee.

3. Click the **Change PIN** button to display the **Change POS PIN** screen.
4. Enter a new **PIN** for the employee, and then enter it again in the **Confirm PIN** field.
5. Click **Save Changes**. Remember to give the PIN to the employee.

REMOVING EMPLOYEES

To remove an employee:

1. Select **EMPLOYEES > EMPLOYEES**.
2. Scroll through the list of your employees and click on the row of the employee that you want to remove or search for the employee.
3. Click the **Remove Employee** button near the top-right corner of the screen. The system will display a popup to confirm removing the employee. Do one of the following.
    - Click **Yes** to remove the employee. If the selected employee has any sales activity, the system will let you know, so that you can determine if you still want to remove the employee.
    - Click **No** to keep the employee.

NOTE: Removing an employee is a "soft delete". This means that although the employee is removed from your view, all the data and activity associated with that employee is still shown in reports, transactions, etc.

SETTING TAX RATES & TAX CATEGORIES

SETTING UP YOUR TAX CATEGORIES AND TAX RATES

The system makes it easy to calculate sales tax on all of your items. We even get you started with a **No Tax** category. You will first set up your tax categories, such as retail, food, alcohol, etc. Then, you will decide which tax category should be your default tax category. Later, when you create your items in your inventory, the system will automatically assign your default tax category to the items for you to save you time. Don't worry -- you can always change the tax category to something other than your default, as needed. By using a tax category that you assign to each item, the appropriate amount of sales tax will be calculated automatically. Each tax category includes a percentage value that determines the tax rate for items assigned to that category.

TAX JURISDICTIONS

The system also allows you to set up and report on multiple tax jurisdictions that are calculated independently of each other for those selling locations that require this tax scenario. We will also itemize the tax jurisdictions on the receipt, as is often required by local regulations. The tax jurisdictions are tied to your tax categories and selling locations. This means when you add a selling location, you can designate any local tax jurisdictions. Additionally, if you have already set up your tax locations and categories, you can simply edit the tax location to enable tax jurisdictions.

ADD A TAX CATEGORY

By default, your store already has a **No Tax** tax category for use with tax-exempt items and a **Sales Tax** tax category for use with taxable items (default). To add a tax category:

1. Click the **Settings** icon located at the top-right corner of the screen.
2. Select **Taxes**.
3. Click the **ADD A TAX CATEGORY** button.
4. Enter a descriptive name for the new tax category in the popup screen.
5. Click **Done**.
6. Click inside the tax rate box for the new tax category and enter the tax rate % that applies to the items in the tax category (such as, 3.250). (If you have multiple selling locations, you will need to enter the tax rate for every selling location.
7. Click **Save** to save the new tax category and its associated tax rate(s).

If your merchandise requires multiple tax categories, repeat this process for every tax category you need to create.

EDITING A TAX CATEGORY

If you want to edit an existing tax category:

1. Click the **Settings** icon located at the top-right corner of the screen.
2. Select **Taxes**.
3. View your tax categories and then:
    - Click inside any of the tax category boxes to enter/edit the tax rate, and/or
    - Click on the tax category's name to edit the name of the tax category
4. Click **Done** to save your changes.

REMOVING A TAX CATEGORY

If you want to remove a tax category you have already set up:

1. Click the **Settings** icon located at the top-right corner of the screen.
2. Select **Taxes**.
3. Click on the name of the tax category you want to delete.
4. Click **Delete** to delete the tax category. The **Delete** button will only be enabled if there are no items assigned to this tax category. The system will display an alert to let you confirm removing the tax category:
    - Click **Yes** to remove the tax category. If the selected tax category has any sales activity, the system will let you know, so that you can determine if you still want to remove the tax category.
    - Click **No** to keep the tax category.

NOTE: Removing an employee is a "soft delete". This means that although the employee is removed from your view, all the data and activity associated with that employee is still shown in reports, transactions, etc.

PAYMENT METHODS

SETTING UP PAYMENT METHODS

Payment methods are simply the ways you collect money from your customers. You select the ones you accept, and we'll make sure the POS app is ready to accept those payments.

The system can be set up to accept cash, checks, credit cards, gift cards, PayPal Mobile Payments, prepaid coupons, or any combination of these payment options for your store. All you need to do is to set up your payment methods in the Back Office.

1. Select the **Settings** icon near the top-right corner of the screen.
2. Select **Payment Methods**.
3. Make your selection for **Manual Card Entry**. This setting will control whether you can manually enter a customer's credit card, rather than swiping it. If you select **Allow**, you become subject to PCI requirements.
4. Make your selection for **Credit Card Tips**. Selecting **Accept** will allow POS users and/or your customers to enter a tip amount on the POS device when paying with a credit card. You cannot place tips on gift cards.
5. To always require a customer's signature, enter $0.00 in the **Require signature for purchases greater than** field. To enable faster checkouts, you can enter a minimum dollar amount that will require a customer's signature.
6. Make your selection for **Batch Settlement** (not available for PayPal Here).

IMPORTANT: Be aware that you can only adjust tips for closed transactions that belong to a batch that has not been settled yet. If you adjust tips at the end of your business day, you want to be sure to set your batch settlement time to occur after your normal business hours.

- **Manual**-- If you select this option, you will need to manually send your batch settlement to your payment processor on the **RESULTS > CREDIT SETTLEMENT** screen each time you are ready to settle a batch.
- **Automatic**-- If you select this (default) option, the system will pre-populate the **Send Batch at** field with the optimal time (in EST) to automatically send your batch settlement to your payment processor to ensure the quickest deposit of funds. You can change this time if you prefer to send it at a different time. Please note that if you accept tips, be sure to review your settlement time to ensure it allows you adequate time to enter tips before settlement occurs. Once settlement is complete, no changes can be made to a transaction.

7. Under the **Integrated Gift Cards** section, the **Gift Card Processor** field is view-only. If it displays as:

   - **None**-- no gift cards have been set up
   - **Active**-- your gift card setup is complete

8. Finally, select your **Accepted Payment Methods** for your store:
   - Cash
   - Check
   - PayPal
   - Prepaid Coupons -- Select this option if your store accepts daily deals (e.g.,Groupon™ or LivingSocial™) or similar pre-paid coupons.
   - Credit Cards
     - Integrated - This option indicates that you are using the secure credit card reader included in the hardware bundle and our integrated credit card processing.
     - Non-integrated--This option indicates that you are using a separate, stand-beside device (e.g., a Xon terminal) to process credit card payments.
   - Gift Cards
     - Integrated -- This option indicates that you are using the secure credit card reader included in the hardware bundle and our integrated gift card processing. If the **Integrated Gift Cards Status** shows **Active**, this box will already be selected for you and will be disabled.
     - Non-integrated -- This option indicates that you are using a separate, stand-beside device (e.g., a Xon terminal) to process gift card payments.
9. Click **Save**.

OFFLINE CREDIT

IMPORTANT: Because of the increased liability and risk exposure when operating in this mode, offline mode can only be enabled by an Account Manager.

Enabling offline credit mode allows you to process a limited number of credit card transactions in the event communication between your POS device and the credit card processor is not available. Once connection is reestablished, all transactions are sent to the processor automatically. The Account Manager should contact Customer Care and ask to have the offline credit mode enabled. This will expose the **Offline Credit** setting in the Back Office. For detailed information, please visit our support portal at: http://customercare.ncrsilver.com

WORKING WITH ITEMS

CHANGING AN ITEM’S PRICE

If you have an NCR Silver multi-store account, and you want to update prices for all of your stores, switch to Company View.

SINGLE STORE CUSTOMERS

1. Select **INVENTORY > CATEGORIES & ITEMS**.
2. Select the item to edit.

3. Click inside the **Sales Price** field and enter the store's price for that item.
4. Click **Save**.

MULTI-STORE CUSTOMERS

By default, your stores and will have the same price at each of your stores. However, you can override the price of items for your multi-store account. To do this:

1. Select the store where you need to assign a different price to the item.
2. Select **INVENTORY > CATEGORIES & ITEMS**.
3. Select the item to edit.
4. Click inside the **Sales Price** field and enter the store's price for that item.
5. Click **Save**.

To remove store-specific pricing for an item and revert back to the Company price:

1. Select the store where you need to assign a different price to the item.
2. Select **INVENTORY > CATEGORIES & ITEMS**.
3. Select the item to edit.
4. Click the ⊗ in the **Sales Price** field. The system will replace the store price with the Company price.
5. Click **Save** to save your changes.

CHANGING AN ITEM'S POS AVAILABILITY

If there are items loaded into your Back Office that you don't sell at your store(s), you can mark them as unavailable on the POS. This means that the item won't show up in the POS app, but it doesn't actually delete the item.

SINGLE STORE CUSTOMERS

1. Select **INVENTORY > CATEGORIES & ITEMS**.
2. Select the item to edit.
3. Click inside the **Availability: This item is available at POS** to remove the checkmark.
4. Click **Save**.

MULTI-STORE CUSTOMERS

1. Select the store where you need to assign a different price to the item.
2. Select **INVENTORY > CATEGORIES & ITEMS**.
3. Select the item to edit.
4. Click inside the **Availability: This item is available at POS** to remove the checkmark.
5. Click **Save**.

DISCOUNTS

Your account is pre-loaded with several discounts. Select **INVENTORY > DISCOUNTS** to view these. You can edit these discounts, remove them, and/or add your own discounts.

ADDING A DISCOUNT

You can set up item and ticket-level discounts. This allows employees to apply a single discount to each item and an overall discount to an entire sale in the POS app. With our system, your discounts will "stack", allowing both types of discounts to be applied to an item. Item-level discounts will always be applied first, followed by ticket-level discounts. You can only assign one item-level discount to an item, and you can only assign one ticket-level discount to a ticket. You can assign an item-level discount to item(s) and a ticket-level discount to the same ticket. If you are one of our multi-store customers, remember that discounts are managed at the Company level.

1. Select **INVENTORY > DISCOUNTS**.
2. Select **Add a Discount**.
3. Enter a **Name** and **Description** for the discount.
4. Select one of the following **Discount Type** options:
    - **Amount**– Select this option for a fixed dollar discount that can't be changed.
    - **Percent**– Select this option for a fixed discount percentage.
    - **Prompted Amount**– Select this option to allow employees to change the discount amount during a sale.
    - **Prompted Percent**– Select this option to allow employees to change the discount percentage during a sale.
5. When you have selected a **Discount Type** option, enter the **Amount Off** or the **Percent Off** or **Prompted Amount** or **Prompted Percent** (based on your select in step 4) for the discount.
6. From the **Applies To** dropdown, select **Item** to specify when the discount can be applied to individual items or select **Ticket** to apply the discount to an entire sale.
7. Enter a value in the **Min Qualifying Amount** field to specify the minimum eligible price for an item-level discount or the minimum sale amount for a ticket-level discount. If you don't want set an amount, leave the default $0.00.
8. Click **Save Changes** to save the new discount.

EDITING OR REMOVING A DISCOUNT

You can edit an existing discount or remove a discount you no longer want to maintain. To do this:

1. Select **INVENTORY > DISCOUNTS**.
2. Scroll through the list of your discounts and click on the row of the discount that you want to edit or remove.
3. Do one of the following:

- To remove the discount, select **Remove Discount** and confirm the removal. If the selected discount is tied to a marketing email, the system will let you know, so that you can determine if you still want to remove the discount.

- Edit the details for the discount and click **Save Changes**.

TIME CLOCK

ADJUSTING TIME CLOCK ENTRIES

You can view the current business day's time clock activity from the POS device, and you can also view and update this information in the Back Office. You can use the **Time Clock** adjustments screen to view, add, edit, and delete time clock punches.

ACCESSING TIME CLOCK ADJUSTMENTS

1. Select **EMPLOYEES > TIME CLOCK**.
2. Select the date range.
3. Select the filtering option. The default filter is **All Punches**, but you can select to view only **Unpaired Punches**.
4. Tap  .

ADDING A CLOCK IN/OUT FOR AN EMPLOYEE

If an employee forgets to clock in, or clock out, or both, you can do that for them in the Back Office using the **Time Clock** screen. When a user clocks in and then later clocks out on the POS device, the system will try to pair those time clock punches together. If a user clocks in or out more than once, or if they forget to clock in or out, this can result in an unpaired punch.

If you have an unpaired punch for any day other than the current business day, we'll show the word MISSING to draw your attention to this situation.

If you have an unpaired punch for the current business day, we'll show the word OPEN.

NOTE: A Business Day in our POS system runs from 3:00 am to 2:59 am in the time zone of your store.

1. Select **EMPLOYEES > TIME CLOCK**.
2. Select **Add Clock In/Out** button. The system will display the **Add Clock In/Out Activity** screen.
3. Click **Employee Name** and select the employee from the list.
4. Select the date and time for the **Time In**.

5. Select the date and time for **Time Out**.
6. You can optionally enter any notes/comments for editing an employee's time clock activity.
7. Click **Save Changes**. The system will display an asterisk on the left side of that row to let you know that the shift was edited.

EDITING EMPLOYEES' TIME CLOCK ACTIVITY

1. Select **EMPLOYEES > TIME CLOCK**.
2. Click on the row you need to edit. The system will display the **Edit Clock In/Out Activity** screen.
3. Edit the **Time In**, **Time Out**, and or **Notes/Comments** and click **Save Changes**. The system will display an asterisk on the left side of that row to let you know that the shift was edited.

DELETING A SHIFT

1. Select **EMPLOYEES > TIME CLOCK**.
2. Click on the row you need to delete. The system will display the **Edit Clock In/Out Activity** screen.
3. Click **Delete Shift**.
4. Click OK to confirm deleting the shift. The system will display an asterisk on the left side of that row to let you know that the shift was edited. The deleted shift will still display, but it will be disabled, meaning that you can't edit a deleted shift. If you deleted a shift by mistake, you will need to add the shift.

CREDIT CARD SETTLEMENTS

To see what credit batches have been settled, will be settled, or failed to settle, use **Credit Settlement**. We set the default to automatically settle your batches overnight at 3:00 A.M. EST; however, you can change this time on the **Payment Methods** screen. You will automatically receive an email notifying you of credit batches. This email will originate from *monetra1@ncrwebhost.com*, and the subject line will display *Monetra CRON Job Output: SUCCESS*, or *Monetra CRON Job Output: FAIL*, depending on the results of the settlement.

1. In the Back Office, click **RESULTS > CREDIT SETTLEMENT** and then choose the credit batch you want to see by choosing from one of the default timeframes or by entering a specific timeframe and clicking .
2. Select any batch, and the individual transaction from that batch will display at the bottom of the screen. Click on the **Batch Totals by Pay Type** tab to display the sales transactions by pay type within that batch.
3. Click **Settle Batch** to run a settlement on demand. You can also void unsettled transactions by clicking **Void Transaction** in the event they are causing a batch settlement to fail.

NCR Silver Customer Care: 877-270-3475

Chat with us Live by logging in to your Back Office

Available 24/7, 365

customercare.ncrsilver.com