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Extended Item Setup

Use this Extended Item Setup to enter detailed information about complex items. If you have more basic items, use the Basic Item Setup.

Extended Item Setup includes detailed information about an item and allows you to extend the power of our system. This scree covers all the information necessary to create an item using Extended Item Setup, but we will break up the process into smaller "chunks":

- General Information
- Variations
- Item Modifiers
- Printer Groups
- Bar Codes
- External IDs
- Buying & Selling
- Inventory Tracking

We will use the example of creating a sweater with variations of size, color, and type with a modifier for a monogram. We will let the system automatically generate all the possible combinations for us, and we will use a unique bar code for each combination.

General Information

Let's start with entering general information for the item.

lasic Item Se	tup	1 Dep
* Indicates required field.		
Category *	SWEATERS	
Item Name *	ABC Sweater	
Availability	☑ This item is available at POS	
Pricing and Taxes		
Sold by *	© Each O Weight/Measure	
Sales Price *	20.00 Prompt for Price at POS	
Tax Category *	General Merchandise	
	Extended ten Setup Extend the power of NCR Silver	
	Set up Variations and Modifiers, Receiving and Inventory Tracking for this tem.	
Save Save	and Add Another Discard Changes Close	

- 1. Select INVENTORY > CATEGORIES & ITEMS.
- 2. Select the category for the item from the left side of the screen and select **CREATE AN ITEM**.
- 3. Enter an Item Name of up to 20 characters for the item.
- 4. By default, the checkbox for This item is available at the POS is checked for you. This means once you have set up the item, it will be displayed on the POS and available for sale. If you do not want this item to display on the POS, uncheck the box.
- Select either the Each or Weight/Measure option to indicate how you want to sell the item. The price for a weighed or measured item is per pound, foot, or whatever the unit of measure may be. Your employees will need to know how items are weighed/measured.
- 6. Enter the **Sales Price** for the item in xx.xx format.
- If you want the system to alert the POS user to enter a price for the item at the time of the sale, check the **Prompt for Price at POS** box.
- Select the Tax Category for the item. The system will automatically select your default tax category, but you can click the field and select another tax category for the item.
- Click Extended Item Setup. When the screen refreshes, you will see that information you entered on the Basic Item Setup screen is populated on the Extended Item Setup screen, and you will see additional fields and selections.
- 10. Optional: enter a **Description** for the item (up to 30 characters).

xtended Ite	m Setup	Basic Item Setup	Duplicat
* Indicates required field.			
General Information			
Category *	REG MULTI		
Item Name *	Short Name (20 char max)		
Availability	Z This item is available at POS		
	This item is available Online		
Description	Long Name (30 char max)		
Variations	Add a Variation		
Item Modifiers	Assign item Modifiers BREAD, COFFEE FLAVORS, CONDIMENTS & <u>3 other modifier group</u>	ps	
Bar code			
External ID			
	Terra Barra		

Now, let's move on to setting up variations.

Variations

Confused about the difference between variations and modifiers?

Variations are selections the POS user must make to add the item to a ticket. In our example, our sweater will have 3 variations: **Size** (Small, Medium, and Large), **Color** (Blue, Black, and Red), and **Type** (V-neck, Turtleneck, and Cardigan).

To add the first variation

- 1. Click Add a Variation.
- Select a variation from the list or enter click Add Custom to enter your own variation. You can enter up to three variations. When the screen refreshes, you will see a new button to click to enter the values for your first variation.

	on for each item in your inventory, You should add a variation if this item is sold in different sizes, colors, flavors, etc	
Select a Variation		

- 3. In our example, we will use **Size** as the first variation, so we will click the **Add a Size** button to enter our sweater sizes.
- 4. The system will display an empty text box, type your first variation detail in the box. In our example, we will enter three values of Small, Medium, and Large.
- Repeat steps 3 and 4 until you have entered all the values for the first variation.
- Use the O O controls to re-arrange the order of your list of values and use the O control to delete a value.

Size	0	O Add a Variation	
Smell	000		
Medium	000		
Large	000		

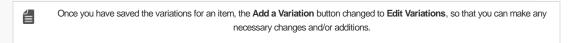
 To add a second variation, click Add a Variation and repeat steps 2 through 6 until you have entered all the values for the second variation; otherwise, skip to step 9. In our example, our second variation will be Color.

Size	0	Color		Add a Variation	
Small	000	Blue	000		
Medium	000	Black	000		
Large	000	Red	000		
O Add a Size		Add a Color			

 To add a third variation, click Add a Variation and repeat steps 2 through 6 until you have entered all the values for the third variation; otherwise, skip to step 9. In our example, our third variation is Type.

Size	0	Color	V 0	Type	0
Small	000	Blue	000	V-neck	000
Medium	000	Black	000	Turtleneck	000
Large	000	Red	000	Cardigan	000
O Add a Sae		O Add a Color		O Add a Type	

9. Click Done.



Now, let's move on to setting up item modifiers.

Item Modifiers

Modifiers are additional selections (options) the POS user can make to add the item to a ticket. In our example, our sweater will have a modifier for adding a monogram.

 Click Assign Item Modifiers. The system will display the Item Modifiers screen. In the example below, we have already set up four modifier groups, including one for Monogram with four different options (Single Letter Script, 3 Letter Script, Single Letter Block, and 3 Letter Block). If you haven't set up your modifier groups yet, refer to Creating a Modifier Group. You will want to uncheck any modifier groups that should not be associated with the item. Since Monogram is already selected, click **Done**. This means that anytime this sweater is selected at the POS, the modifier for **Monogram** will be available to the POS user.

Which tem Modifier Groups are available for this tem?	AL
MODIFIER GROUP	
CONDIMENTS	
MEAT TEMPERATURE	
V MONOGRAM	
SANDWICH TOPPINGS	

Now, let's move on to setting up printer groups. Printer groups are primarily used for food service merchants.

Printer Groups

Printer groups are used to determine where, in addition to the receipt printer, an item will print. They are most often used by businesses that prepare food and send orders to the kitchen. Examples of common printer groups include Kitchen, Bar, and Grill. Using this field, you can select which printer you want each of your items to print to. You can use the default groups, or create your own custom groups. You can also choose to leave the field blank if there are items you do not want to be sent to a printer.

All new items are defaulted to the **Kitchen** printer group. To change this, click the **Printer Group** field and select a different printer group from the list or click **<< Add New >>** and enter a new printer group.

Printer Group Se	etup			
		Search Printer Grou	ps	Q
Printer Gr	oups		C	Add a Printer Group
Printer Group Name				
Kitchen				
Printer Group De	tail			
	t ail			
)		
		Remove Printer Group	Close	

Click the **Printer Group** link to view the **Printer Group Setup** screen. This screen will allow you to add, edit, and delete printer groups.

NOTE: If your business does not use printer groups, you can simply ignore this field. It is not necessary to change the printer group from the default value to blank.

IMPORTANT: In order for your printer routing to work correctly, you must configure each printer group on each POS device. To learn how to complete the printer group set up on the POS, see Configuring Printers.

Now, let's move on to setting up bar codes.

Bar Codes

If we wanted to use a single bar code for all the combinations of our sweater, we would enter it in the **Bar code** field. However, we want to assign a unique bar code to each possible combination. This may sound like a daunting task, but our system does the work for you. To see how this works:

 Click Assign Bar Codes. The system will automatically create the list of all of the possibilities using the variations we entered. All we need to do is assign a bar code to each sweater.

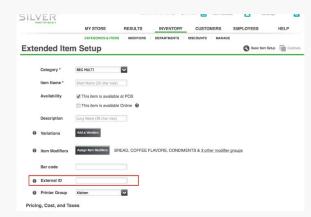
TEM VARIATION	BAR CODE	
Small, Blue, V-neck	Enter a Bar Code	<u>^</u>
Small, Blue, Turtleneck	Enter a Bar Code	1
Small, Blue, Cardigan	Enter a Bar Code	
Small, Black, V-neck	Enter a Bar Code	
Small, Black, Turlleneck	Enter a Bar Code	
Small, Black, Cardigan	Enter a Bar Code	
Small, Red, V-neok	Enter a Bar Code	

- 2. Click Enter a Bar Code and enter or scan the bar code for each variation of the item.
- 3. Click Done.

External IDs

This field allow users to enter and search for items by External ID.

• If the item does not have any variations, a single field is displayed. You can enter the External ID for the item in the field displayed below:



• If the item has variations, a button is displayed instead of a field.

Extended Iter	n Setup	🔇 Basic Item	Setup Duplicate
Category *	SANDWICHES		
Item Name *	BLT		
Availability	This item is available at POS		
	This item is available Online 0		
Description	Long Name (30 char max)		
Variations	Edit Variations		
	Avocado		
Item Modifiers	Assign Item Modifiers BREAD, COFFE	E FLAVORS, CONDIMENTS & 3 other modifier groups	
Bar code			
	Assign Ber codes		
External ID	Assign External ID		

Once you click on the button, it will open a modal that allows you to enter an External ID for each variation combination.

Tach	ام مر م	ad	Hanna.	Cal		-
EXI	ena	ea	Item	Sei	u	p

	External ID for BLT		
Description	ITEM VARIATION	External ID	
Ø Variations	Ketchup		
	Mustard		
Item Modifiers	Sriracha		
Bar code	t.		

Now, let's move on to entering the buying and selling information.

Buying & Selling

We are almost done. We need to define how we buy and sell our item. In our example, we set up three variations. Our system allows you to pick one variation that will control the price of the item. In our example, we will use the Type variation as our priced variation.

- 1. Click the **Price and Cost** field and make a selection:
 - · Use a single price and cost for all variations
 - Use variation 1 (variation name) for pricing and cost
 - Use variation 2 (variation name) for pricing and cost
 - Use variation 3 (variation name) for pricing and cost
- 2. When the screen refreshes, you will see a new grid for the variation chosen. Click in the SALES PRICE box for the first row and enter the price for that variation.

Pric	e and Cost *	Use variation Type for	pricing and cost	Prompt for Price	at POS	
Sol	d by *	@ Each O Weigh	ht/Measure			
Tax	Category *	General Merchandise				
Rec	ceived As		O Package			
		TYPE		SALES PRICE *	UNIT COST	MAR
		V-neck				
		Turtieneck Cardigan				

3. Click in the UNIT COST area for the first row and enter the cost for that variation. The system will auto-calculate the MARGIN for you.

4. Repeat steps 2 and 3 for each variation (row).

TYPE	SALES PRICE *	UNIT COST	MARGIN
/-neck	20.00	8.00	60.00%
urtleneck	25.00	10.00	60.00%
Cardigan	35.00	14.00	60.00%

5. Click on the Quantity on Hand button to enter the initial quantity on hand. Extended Item Setup

		· ••••••
ų	External ID	Assign External ID
0	Printer Group	Kitchen
Pricin	ig, Cost, and Tax	es
	Price and Cost *	Use a single price and cost for all variations Prompt for Price at POS
	Sold by *	Each O Weight/Measure
	Sales Price *	6.00
	Tax Category *	Sales Tax
	Received As	Individual Item O Package
	Unit Cost	
	Qty on Hand	Set Quantity
	Primary Vendor	V

NOTE: Items without variations will have a single field instead of a button to enter the quantity.

Once you click on the button, it will open up a modal that allows you enter starting quantities for each variation.

External ID	Quantity on hand for BLT		
Printer Group		QTY ON HAND	
icing, Cost, and Taxe	Sourdough, Pepperjack	Enter a Quantity	
Price and Cost *	Sourdough, Swiss	Enter a Quantity	
	Rye, Pepperjack	Enter a Quantity	
Sold by *	Rye, Swiss	Enter a Quantity	
Sales Price *			
Tax Category *			
Received As			
Unit Cost	Dome Cancel		

Now, let's move on to the inventory information.

Inventory Tracking

Our system also manages your inventory for you. For more information on inventory tracking, refer to Managing Your Inventory.

