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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   | <b>1</b> 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 |                   |  |
|        |     |                   |  |

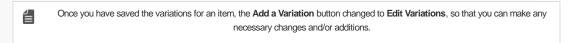
 To add a second variation, click Add a Variation and repeat steps 2 through 6 until you have entered all the values for the second variation; otherwise, skip to step 9. In our example, our second variation will be Color.

| 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 <b>ail</b> |                      |       |                     |
|                    |              | )                    |       |                     |
|                    |              | 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.

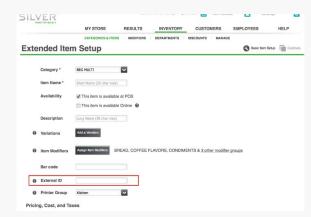
| TEM VARIATION            | BAR CODE         |          |
|--------------------------|------------------|----------|
| Small, Blue, V-neck      | Enter a Bar Code | <u>^</u> |
| Small, Blue, Turtleneck  | Enter a Bar Code | 1        |
| Small, Blue, Cardigan    | Enter a Bar Code |          |
| Small, 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<br>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.

