NCR Silver Back Office Demo Setup – Spreadsheet import and setup options

If you have not taken the time to setup your own sample categories and items in the demo account that has been provided, we have prepared item and customer import files to help get you started.

The spreadsheet provided for your inventory import includes a variety of categories that could be found in different types of stores, and items that might be associated with those categories. However, feel free to add to the demo account any other categories and/or items that might apply to your prospects. The Customer file includes basic names, category, email, and phone, which you can modify as needed.

In order to set up your NCR Silver demo account with this import files, login to your NCR Silver demo account and follow the instructions below **BEFORE** importing your item list:

Set Tax Category

1. Login in to NCR Silver using the login credentials received in your email
2. Click on "Settings" tab
3. Click on "New Tax Category"
4. Name the tax category and set the tax rate.
    a. Make sure to select "Default" so that it will apply to the items you will be importing (keep in mind this tax rate will apply to all items)
5. Select your Retail Industry
6. Click "Save Changes"

Import Item File

1. Save the Item Inventory spreadsheet to your computer
2. Click on the "Inventory" tab
3. Click on "Items" tab
4. Click on "Import Items" at the bottom of the page
5. To upload the spreadsheet, click the file folder "Browse to Select File"
    a. Go to where the spreadsheet was saved and select the file to be uploaded
6. Click "Review Item List" – Note those items that are identified as "prompt for price"
7. Click "Import Item List"

Import Customer File

1. Save the Customer List spreadsheet to your computer
2. Click on "Customers" tab
3. Click on "Customers"
4. Click "import Customers" at the bottom of the page
5. To upload the spreadsheet, click the file folder "Browse to Select File"
    a. Go to where the spreadsheet was saved and select the file to be uploaded
6. Click "Review Customer List"
7. Click "Import Customer List"

Other set-up options to consider for your demo account

- All items are imported and priced by "each".
  - You may want to consider adding items that are priced by weight to demonstrate the ability to sell variable weight items, and have the price automatically calculated at the POS.

- All items are imported with NO variations
  - You may want to consider adding variations to some key items. This might include adding size and color options to clothing goods or size and flavor options for food/drink items
  - Remember that you can also set a price by one of the variation options as well if you would like to show this feature

- All items are imported with NO cost or inventory status details
  - You may want to add receiving and cost details to certain items that you will want to have profitability calculated on reports in the back-office.
  - You may want to perform a simple count or receiving of certain items to demonstrate the quantity on hand/inventory management capabilities.

- Set up sample Email Marketing Campaigns with your unique images and messaging
  - Click on the "Customers" tab and then click on "Email Marketing" to set up emails for the email marketing campaign and email receipt.

- Turn on/off "Accept Tips" depending on the type of business
  - Go to the "Settings" tab and in the middle of the page (on the bar where credit setup is), and select to "accept tips" if you want the ability to show adding a tip to a credit transaction.

- Assign items as "Favorites" on your POS device.
  - Go to Item Lookup, search and select an item, then tap "Add to Favorites"

- Set the "Signature Capture" option on the POS device
  - On the home screen of your iOS device, click on the gear button near the top right.
  - Set the signature capture to "Digitally on screen" if you would like to have the customer sign their name for credit card transactions on the device

- Set the "Customer Prompt" option on the POS device
  - If you would like for the system to prompt you to assign a customer to each ticket, ensure that they "Customer prompt" is set to "ON"

- Credit is setup in emulation mode. You can swipe a credit card, and you will receive an authorization confirmation. However, credit detail has NOT actually been sent externally for processing.