

Store User Guide

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NCR

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Welcome

Thank you for choosing NCR Console for your business!

The following User Guide is designed to guide you in the navigation and use of the system features. Please note that based on your brand's chosen solution, you may notice additional features that may not be visible on your platform as you move through the various sections.

New to NCR Console? Check out the [Getting Started](#) topic. This will take you through the process of logging into our system.

Can't find a topic? Contact us via email at support@ncrconsole.com so we can help!

Thank you again for partnering with us, and please don't hesitate to contact us should you have questions or need any additional assistance.

Sincerely,
NCR Console Team

The NCR Console User Guide is provided solely as a resource and contains confidential information proprietary to NCR Console. The contents of this User Guide are not to be copied or distributed to individuals outside of the NCR Console system without prior written permission from NCR Console. This User Guide is provided to you under, and its use is subject to, the terms and conditions of the NCR Console agreement. The information in this User Guide may be changed at any time without notice. NCR Console name, design and related marks are trademarks of NCR. © 2017 NCR. All rights reserved.

Getting Started

In this module, you will learn about:

- Usage of the correct URL to access your account
- How to log into your account
- How to reset your password

Which URL is Right for You?

Corporate Users: If you are a corporate user, please contact your brand's representative to obtain login information.

Store Operators and/or Owners: This site is intended for franchisees or store owners and/or operators. It will give an owner/operator complete access to their location's information such as Sales, Inventory, Labor, Corporate Shared Resources, Communications, Customer Service Feedback, Training Materials, Surveys and more; per the package they have signed up for.

Store Employees: This site is intended for employees of specific locations only. Employees with access to this site will be able to access their work schedule, request time off, request shift coverage, send messages to management, and access training materials assigned to them by management.

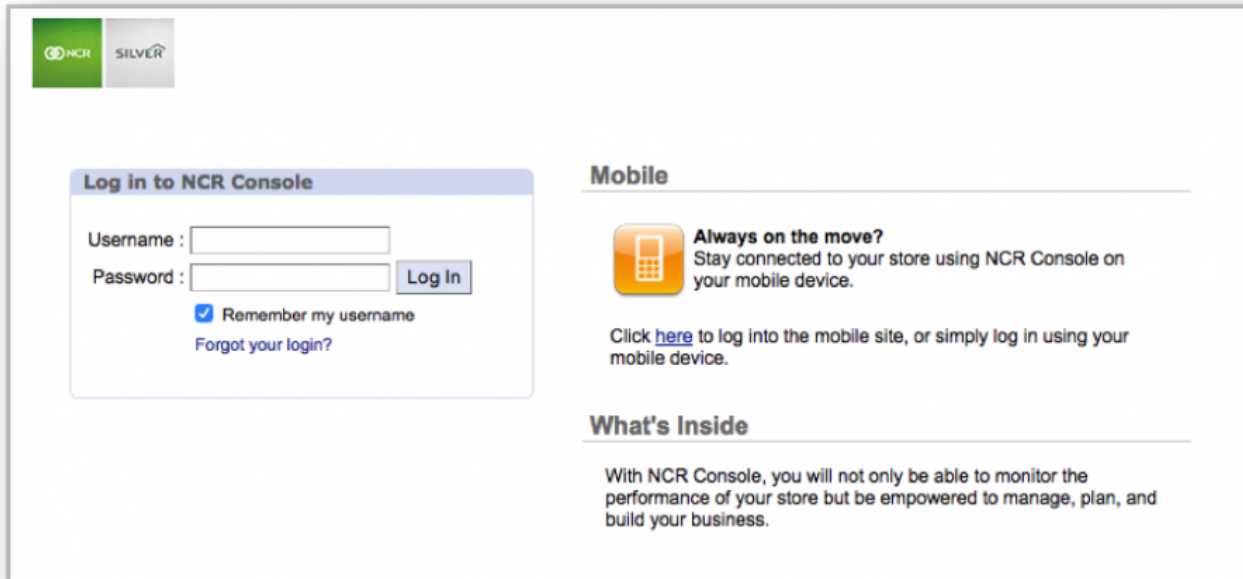
URL

Use the following URLs as they apply to you:

- *Corporate Users:* Obtain from your brand representative
- *Store Operators and/or Owners:* <https://store.ncrconsole.com>
- *Store Employees:* <https://employee.ncrconsole.com>

Log Into Your Account

Enter the applicable URL into your browser to be taken to the login screen.



Log in to NCR Console


Username :

Password :

☒ Remember my username

[Forgot your login?](#)

Mobile

 **Always on the move?**
Stay connected to your store using NCR Console on your mobile device.

Click [here](#) to log into the mobile site, or simply log in using your mobile device.

What's Inside

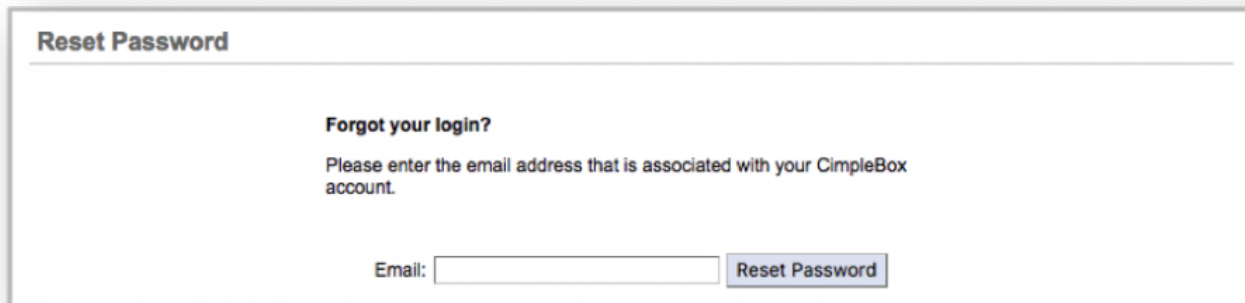
With NCR Console, you will not only be able to monitor the performance of your store but be empowered to manage, plan, and build your business.

To Log In

1. Enter your username
2. Enter your password
3. To have the site automatically recognize you without having to enter your username in the future, check the **Remember my username** box. Choosing this option will allow you to log in without entering your username each time.
 - a. The **Remember my username** option will remain active until you so choose to deactivate it. To ensure the highest level of security and optimize the integrity and privacy of data in your account, we recommend that this option always remain *unchecked*.

Resetting Your Password

In the event you have forgotten your password, you can reset it at any time via the login portal.



Reset Password

Forgot your login?

Please enter the email address that is associated with your CimpleBox account.

Email:

To Reset Your Password

1. Click the “***Forgot your login?***” link located directly below the login form.
2. You will be automatically redirected to a new page.
3. As directed, enter the email address associated with your account, and click the **Reset Password** button.
 - a. Instructions on how to set your new password will be sent to your email address.

Dashboard Overview

In this module, you will learn about:

- The standard Dashboard view
- How to navigate away from your Dashboard
- Basic platform features
- Additional Dashboard features

Welcome to Your Dashboard!

Your dashboard view will vary based on:

- Your selected Console package
- The type of login you have (e.g. Corporate, Store, or Employee user)

- The user permissions that have been assigned to you

Dashboard

Store: **PTC Concierge Support** | Search | Help | Shortcuts | Settings | Log Out

Alerts

Message

Unavailability

Current

Sales By Day

	Today	Prev Week	Prev Year
Sales	\$282	\$89	\$258
Transactions	8	3	13
Average Check	\$35.20	\$29.53	\$19.86

Previous Day

Sales By Week

	Curr WTD	Prev WTD	Prev Yr WTD
Sales	\$282	\$89	\$258
Transactions	8	3	13
Average Check	\$35.20	\$29.53	\$19.86

Daily Progress

May 16

60K, 48K, 36K, 24K, 12K, \$0

PTC Concierge Support

Filter by Store: All Stores [Change]

If you have multiple stores, you can adjust your dashboard view to view one store, a specific set of stores, or all stores by clicking the **Change** link to the right of **Filter by Store**.

Note for non-admin users: The list of stores you see is limited to the stores you are assigned to.

Weather Forecast

One Stop Silver Shop, PTC Concierge Support, Silver Gift Shoppe

Today (7/18) 93° 73°

Tomorrow (7/19) 95° 72°

Wed (7/20) 95° 72°

View Full 5-Day Forecast

Standard Dashboard View

The standard dashboard view (as part of the Core package) contains alerts, general sales data, and weather forecasts for your store(s).

- Alerts: Encompass employee, corporate and system messaging (such as suggested reorders, par levels and inventory transfer status notifications)
 - You also have the ability to access current and arrived alerts by clicking the View All link at the bottom right corner of the Alerts box on the Dashboard

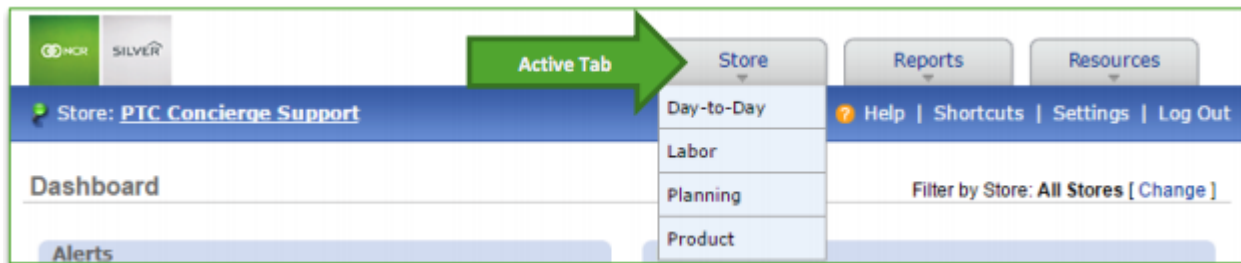
- Alerts are also filterable by date, status or subject



- Sales Data: Includes current data, historical comparisons (where historical information is available) and forecasting based on your store's sales history
- Weather: The dashboard will show a three day outlook which can be expanded to show additional days

Navigating Away From Your Dashboard

To navigate away from your Dashboard to other areas of the site, hover over the active tabs at the top of the page to select a sub category, or click on the active tabs to go to that category's page.



Platform Features

Each active tab contains a subset of features specific to the category you've selected.

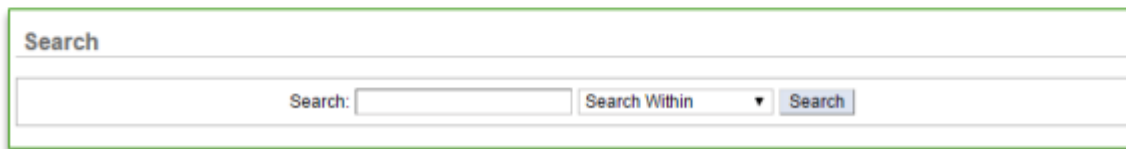
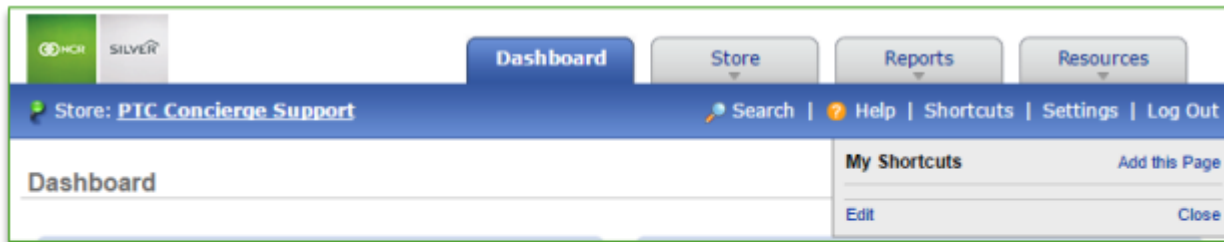
You may notice features referenced below that may not be visible on your platform as you move through various sections of Console. Note that your access to specific features is dependent on what you sign up for and/or have permissions to see.

- Store Tab: Gives access to operational tools that allow you to plan for day to day business activities. This includes, but is not limited to, managing labor, managing inventory, settings sales and/or labor goals, and submitting reviews.

- **Reports Tab:** Provides an array of reports based on your chosen Console package. This may include reports pertaining to sales, labor, customer service, surveys, product mix, operational reviews, training and brand specific custom reporting.
- **Resources Tab:** Gives access to document storage (including documents shared with you by others), videos, and a photo gallery.

Additional Dashboard Features

In the blue bar beneath the tabs at the top of the page, you will have the option to search for specific topics, access help documents, add shortcuts to favorite or frequently visited pages, and adjust settings.



For more information about how to adjust settings, please see the *Console Settings user guide*.

The screenshot displays the NCR Store User Guide interface. At the top, there is an orange header bar with 'NCR' on the left, 'Store User Guide' in the center, and a search bar on the right. Below the header, the main content area is divided into two columns. The left column contains a sidebar with a 'Welcome' tab and two expandable sections: 'Getting Started' (with 'Dashboard Overview') and 'Day-to-Day' (with 'Upload Sales Data', 'Edit Sales', 'Sales Data Snapshot', 'Options', and 'View Sales Totals'). The right column features a large 'Welcome' heading, a thank-you message, a paragraph about the User Guide, a section for new users, and contact information. Below this, a 'Settings' section with a help icon contains three items: 'My Settings' (personal preferences), 'Store Settings' (store preferences and locations), and 'Notification' (email and mobile phone events).

NCR Store User Guide Search

Welcome

Thank you for choosing NCR Console for your business!

The following User Guide is designed to guide you in the navigation and use of the system features. Please note that based on your brand's chosen solution, you may notice additional features that may not be visible on your platform as you move through the various sections.

New to NCR Console? Check out the [Getting Started](#) topic. This will take you through the process of logging into our system.

Can't find a topic? Contact us via email at support@ncrconsole.com so we can help!

Settings

- My Settings**
Set your personal preferences for experience throughout CimpleBox
- Store Settings**
Set your store preferences or add additional store locations to manage
- Notification**
Configure notification events for your email and mobile phone

- [Click here to see the full details](#)

Day-to-Day

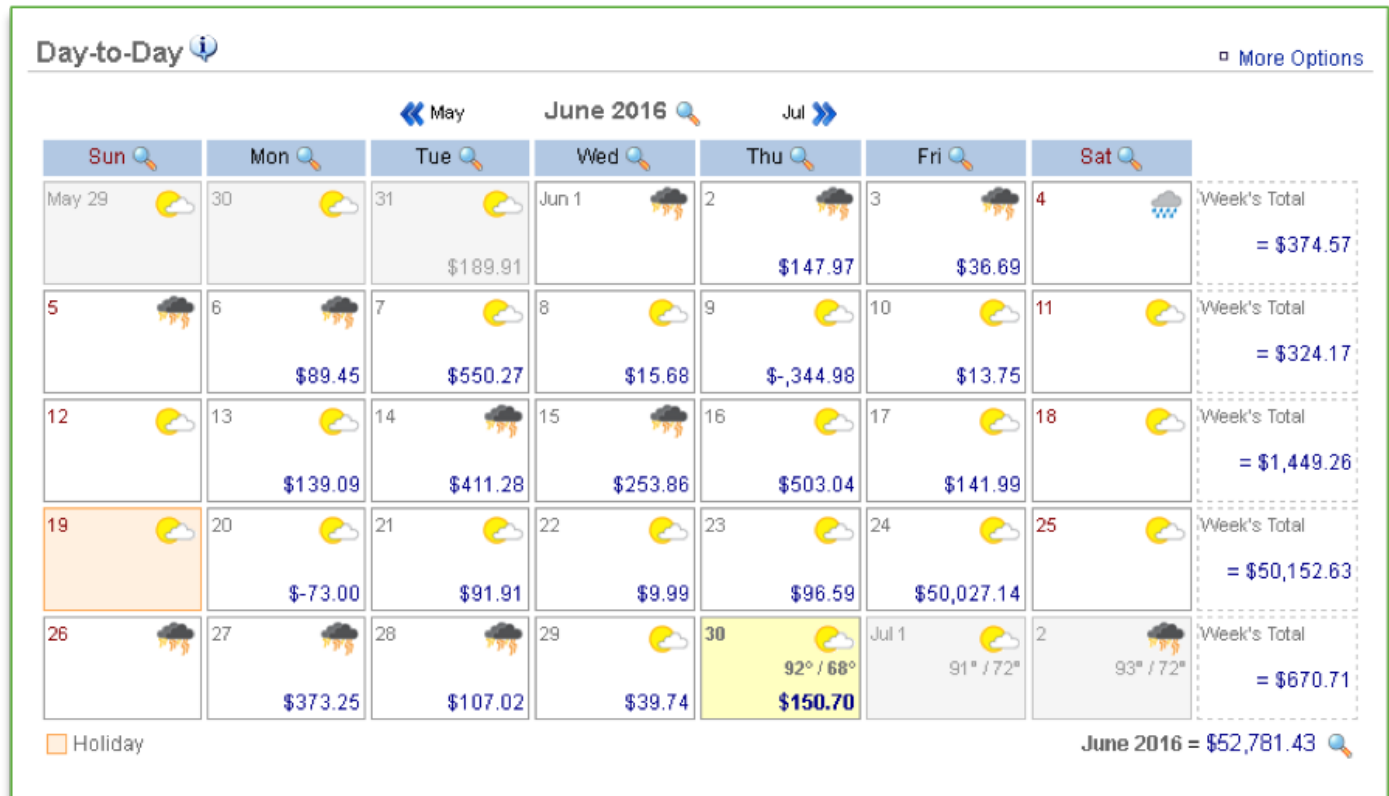
In this module, you will learn about:

- The information contained within the Day to Day calendar
- How to navigate to, and within, the Day to Day calendar

Day to Day Calendar Information

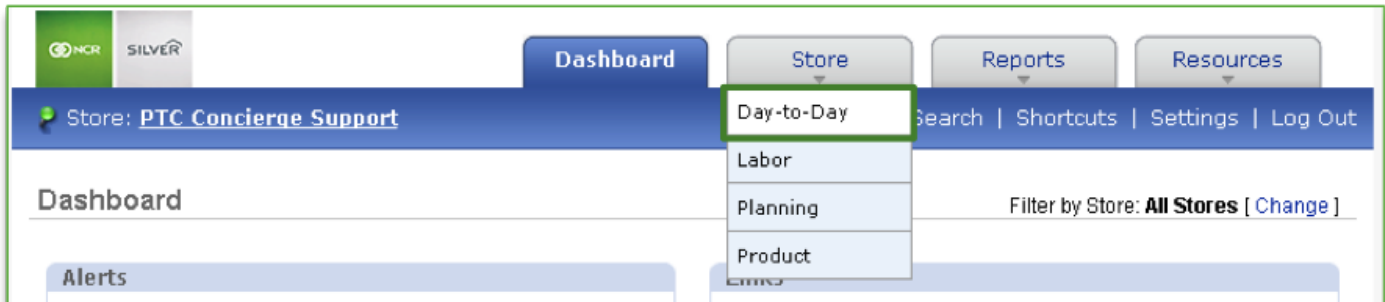
The Day to Day calendar allows you to quickly view:

- Daily, weekly, and monthly sales data for your store, including transaction count and average ticket
- Daily, weekly, and monthly product mix information
- Labor percentage
- Daily notes
- Weather forecast

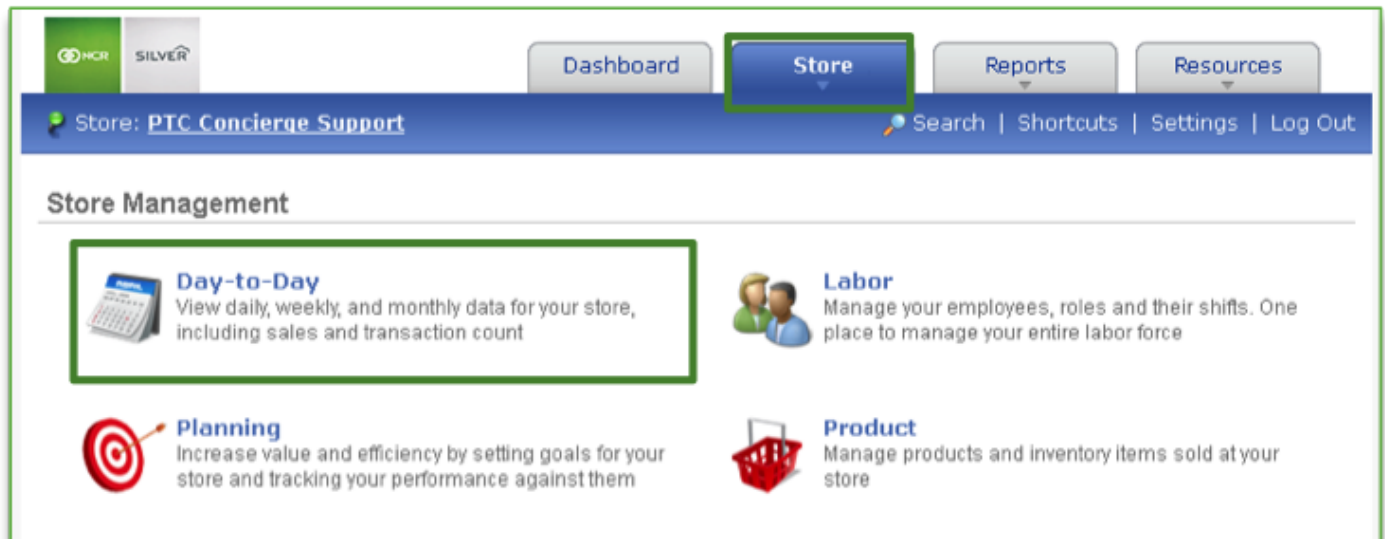


Navigating to the Day to Day Calendar

From your Dashboard view, mouse over the **Store** tab and click **Day-to-Day**. The Day to Day calendar will appear for the current month.



You can also access the Day to Day calendar by clicking on the **Store** tab and then on **Day-to-Day** from the **Store Management** screen.



Navigating Within the Day to Day Calendar

Once you have accessed your Day to Day calendar view, you will see a snapshot of daily, weekly and monthly sales data, as well as the weather for each day.

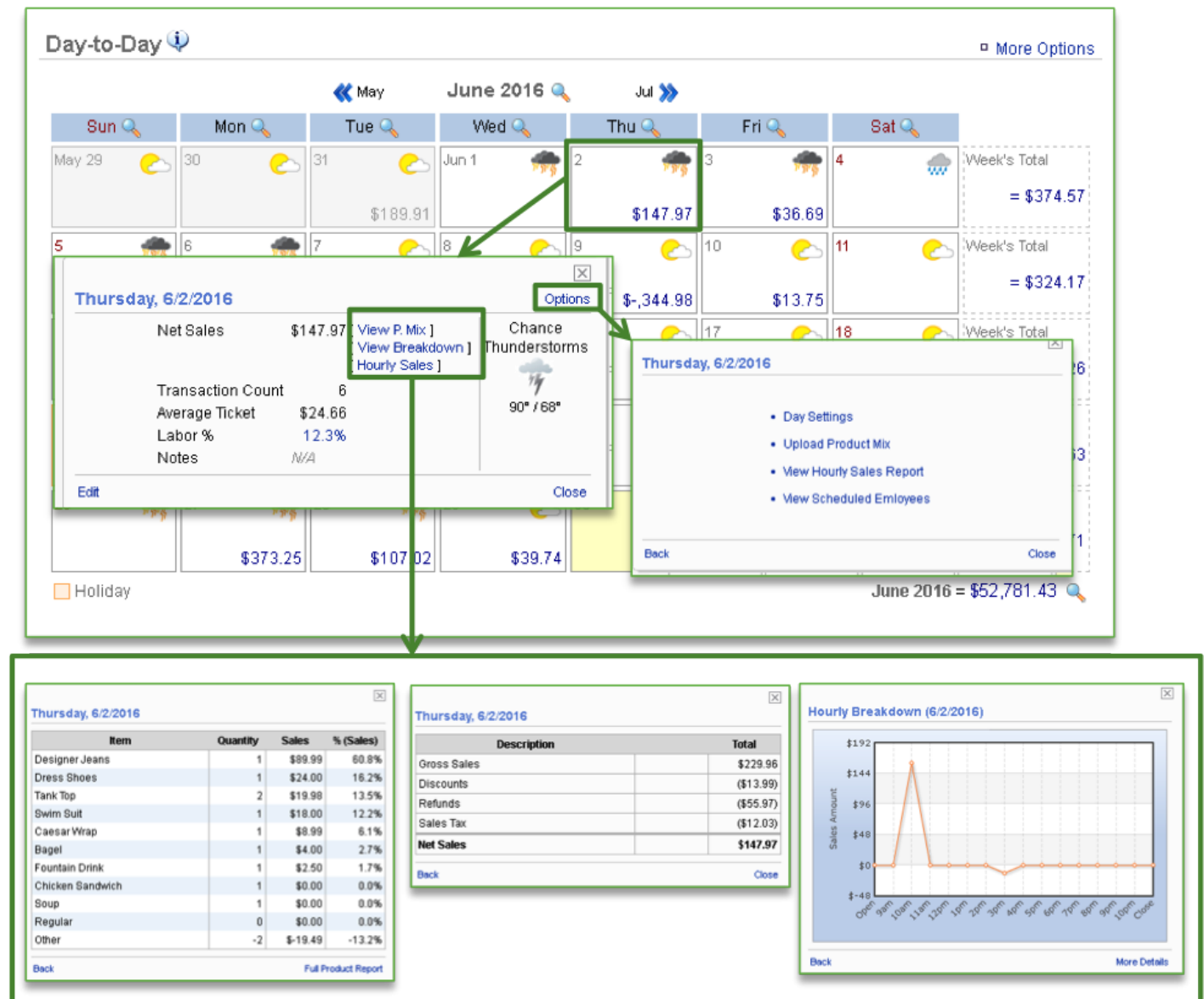
- Weekly sales totals will be reflected to the right of the calendar
- Monthly sales total will appear at the bottom right corner of the calendar
- Click the << and >> icons at the top of the calendar to toggle between months

- You can drill down for additional detail by clicking on any date within the calendar view, weekly total (to the right of the calendar), the magnifying glass next to the monthly total (at the bottom right of the calendar view), or the week day (at the top of the calendar)

Daily Snapshot

Click any date within the calendar view to see Net Sales, Transaction Count, Average Ticket and Labor Percentage information for that day.

- *To the right of Net Sales, you'll have the option to view Product Mix information, Net Sales breakdown and Hourly Sales information*
- *Click Options to view and set Day Settings, view Hourly Sales information and see Scheduled Employees*



Weekly Snapshot

Click any ending week total within the calendar view to see Net Sales, Transaction Count, Average Ticket and Labor Percentage information for that week.

- To the right of Net Sales, you'll have the ability to view Product Mix information, and Net Sales breakdown
- To the right of Labor %, you'll have the ability to view time card information for the week

Day-to-Day ⓘ More Options

May June 2016 Jul

Sun	Mon	Tue	Wed	Thu	Fri	Sat
May 29	30	31	Jun 1	2	3	4
		\$189.91		\$147.97	\$36.69	
5	6	7	8	9	10	11
	\$89.45	\$550.27	\$15.68	\$-,344.98	\$13.75	
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2

Sun (6/12) - Sat (6/18) Summary

Net Sales \$1,449.26 [View P. Mix] [View Breakdown]

Transaction Count 28

Average Ticket \$51.76

Labor % 8.8%

Close

Sun (6/12) - Sat (6/18)

Item	Quantity	Sales	% (Sales)
Woman Nike Shoes	8	\$356.95	24.6%
Treat	130	\$193.39	13.3%
Nike Shox	1	\$89.99	6.2%
Womens Nike	1	\$71.00	4.9%
Mens Nike	1	\$69.99	4.8%
Designer Jeans	1	\$68.00	4.7%
Boots	1	\$60.00	4.1%
Kids Bike	1	\$55.58	3.8%
PASTA I	20	\$48.28	3.3%
Deluxe Pedicure	1	\$45.00	3.1%
Other	53	\$391.08	27.0%

Back Full Product Report

Sun (6/12) - Sat (6/18)

Description	Total
Gross Sales	\$2,108.31
Discounts	(\$388.33)
Refunds	(\$152.95)
Sales Tax	(\$117.77)
Net Sales	\$1,449.26

Back Close

Time Card

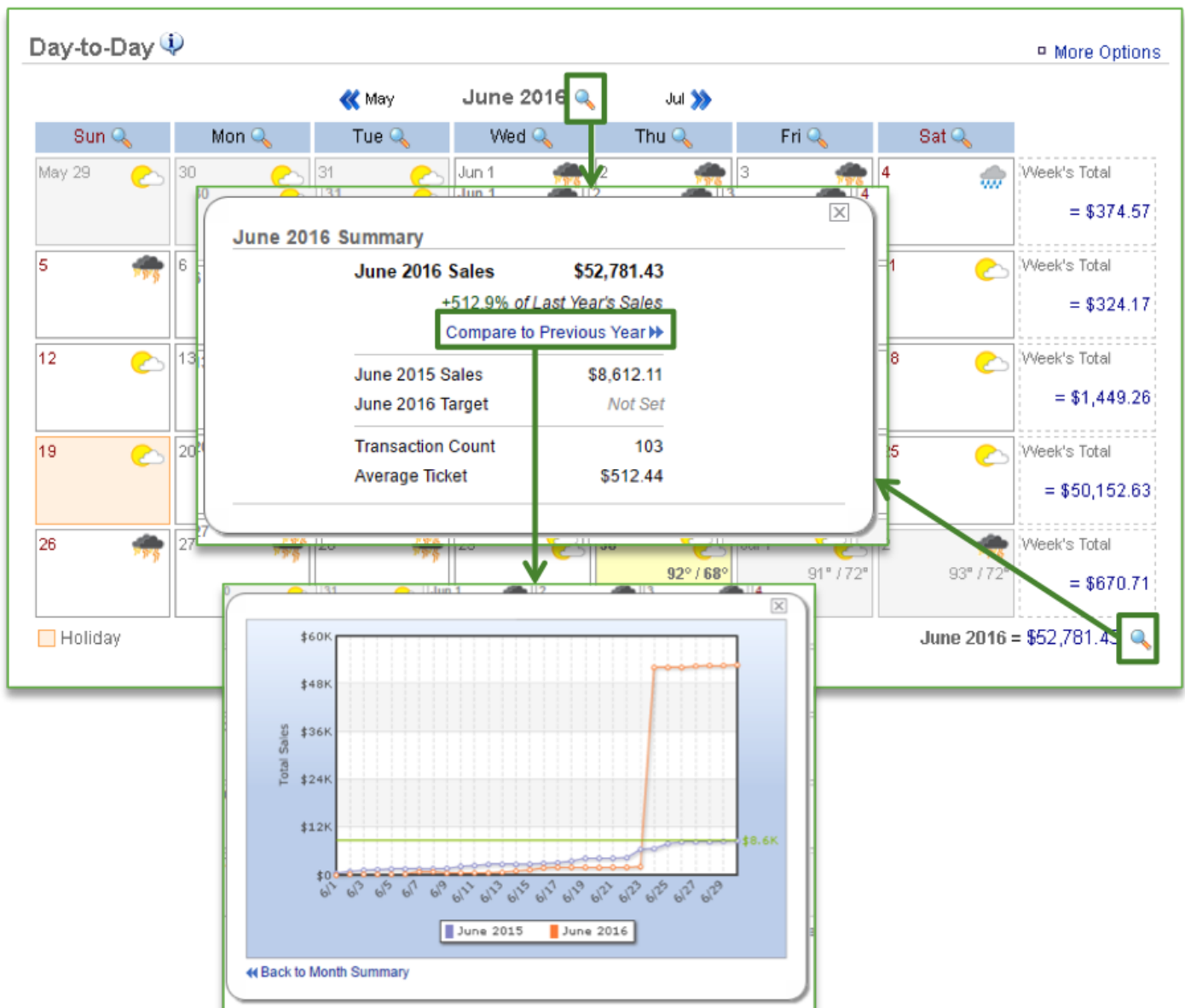
Employee	In	Out	Total Hours
Faith Woods	6/13, 10:17 AM	6/13, 3:30 PM	5.22
Faith Woods	6/14, 2:12 PM	6/14, 11:00 PM	8.80
Amber Delcid	6/15, 2:59 PM	6/15, 9:00 PM	6.02
Daniel Brooks	6/17, 11:18 AM	6/17, 3:45 PM	4.45
Total Hours			24.48

June 2016 = \$52,781.43 ⓘ

Monthly Snapshot

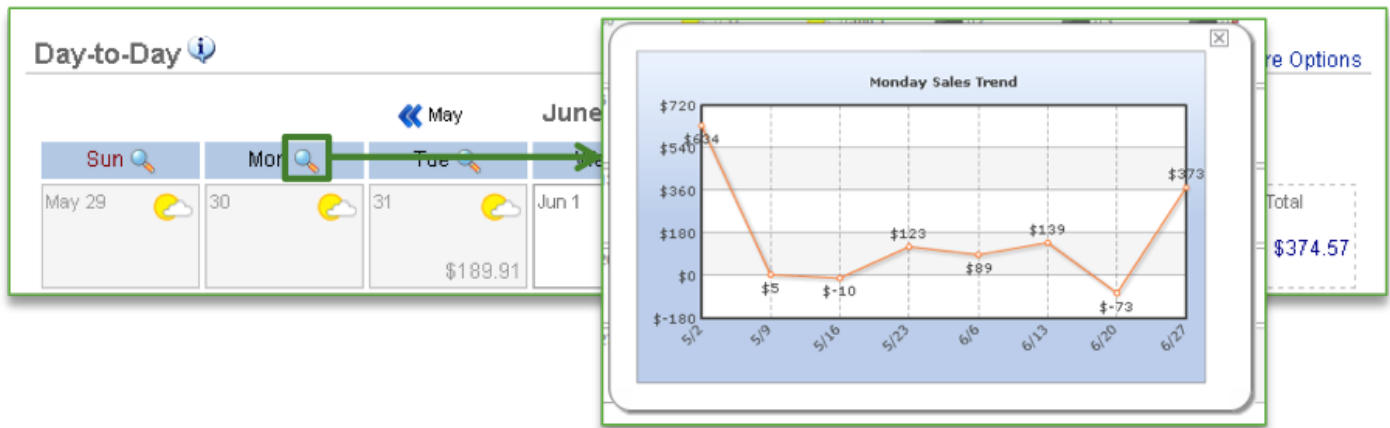
Click the magnifying glass icon to the right of the month at the top of the page or at the bottom right within the calendar view to see Net Sales, Prior Year Sales, Sales Target, Transaction Count, and Average Ticket information for that month.

- Below net sales, you'll have the ability to compare sales to the prior year if that information exists within your Console account



Week Day Snapshot

Click the magnifying glass icon to next to any day of the week to view the week day sales trend for that day.



Related Topics

[Upload Sales Data](#)

[Edit Sales](#)

[Sales Data Snapshot](#)

[Options \(for additional management\)](#)

[View Sales Totals](#)

Upload Sales Data

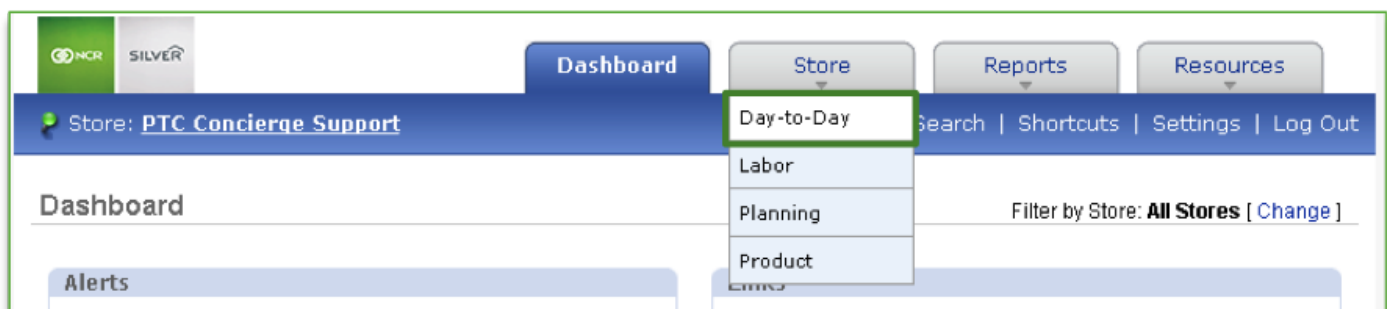
In this module, you will learn about:

- How to upload sales data via the Day to Day calendar platform

Upload Sales Data

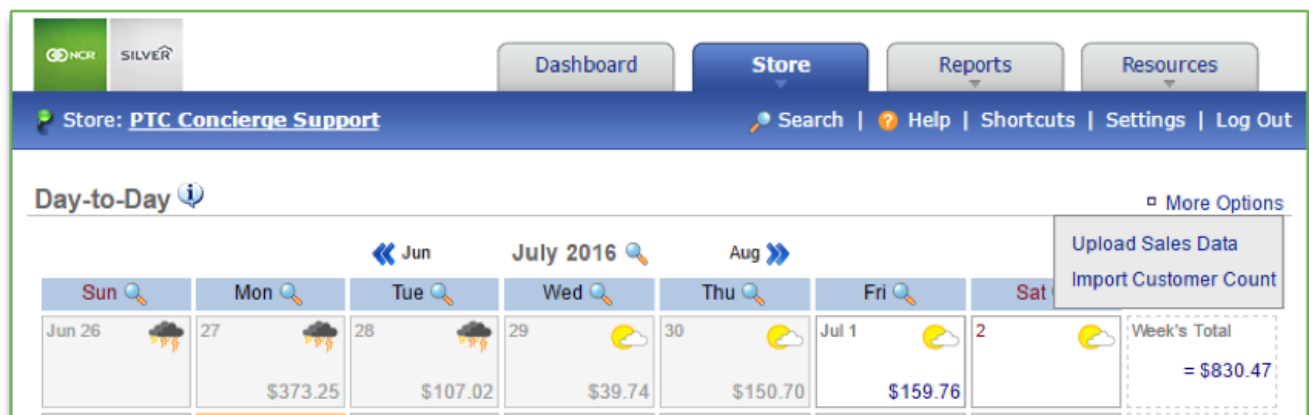
The *Upload Sales Data* feature is typically used when historical data needs to be entered prior to the integration of Console software; or when sales need to be adjusted for a specific day.

To upload sales data you will need to navigate to the Day-to-Day calendar within the Store Management platform.




To Upload Sales Data

1. Click More Options
2. Click Upload Sales Data



3. Select Format

4. Choose file type
 - a. This should be a file you have saved to your computer in an Excel format
5. Click Upload (*Click **Cancel** at any time to cancel your changes and navigate back to the previous screen*). Keep in mind that uploading sales data will override anything that may already be in the system. You will be asked to confirm your choice before the upload takes place.

Upload Sales Data 


Go Back

Format: Microsoft Excel ▼

No file chosen

[Click here to view a sample](#)

Note: To view an example of the required format, click ***“Click here to view a sample”***.

Upload Sales Data 

Go Back

Format: Microsoft Excel ▼

No file chosen

[Click here to view a sample](#)

Microsoft Excel - upload data.xls

	A	B	C	D
1	Date	Sales	Customers	
2	8/1/2007	1260.28	161	
3	8/2/2007	1256.90	158	
4	8/3/2007	1445.04	163	
5	8/4/2007	1793.77	183	
6	8/5/2007	1733.59	184	
7	8/6/2007	1098.54	129	
8	8/7/2007	864.17	124	
9	8/8/2007	1205.44	152	
10	8/9/2007	1311.23	156	
11	8/10/2007	1609.36	178	
12	8/11/2007	1232.46	149	
13	8/12/2007	2009.67	195	
14	8/13/2007	1073.06	130	
15	8/14/2007	1208.15	160	
16	8/15/2007	1293.98	168	
17	8/16/2007	1241.86	141	
18	8/17/2007	1481.49	172	
19	8/18/2007	1376.77	153	

Related Topics[Edit Sales](#)[Sales Data Snapshot](#)[Options \(for additional management\)](#)[View Sales Totals](#)

Edit Sales

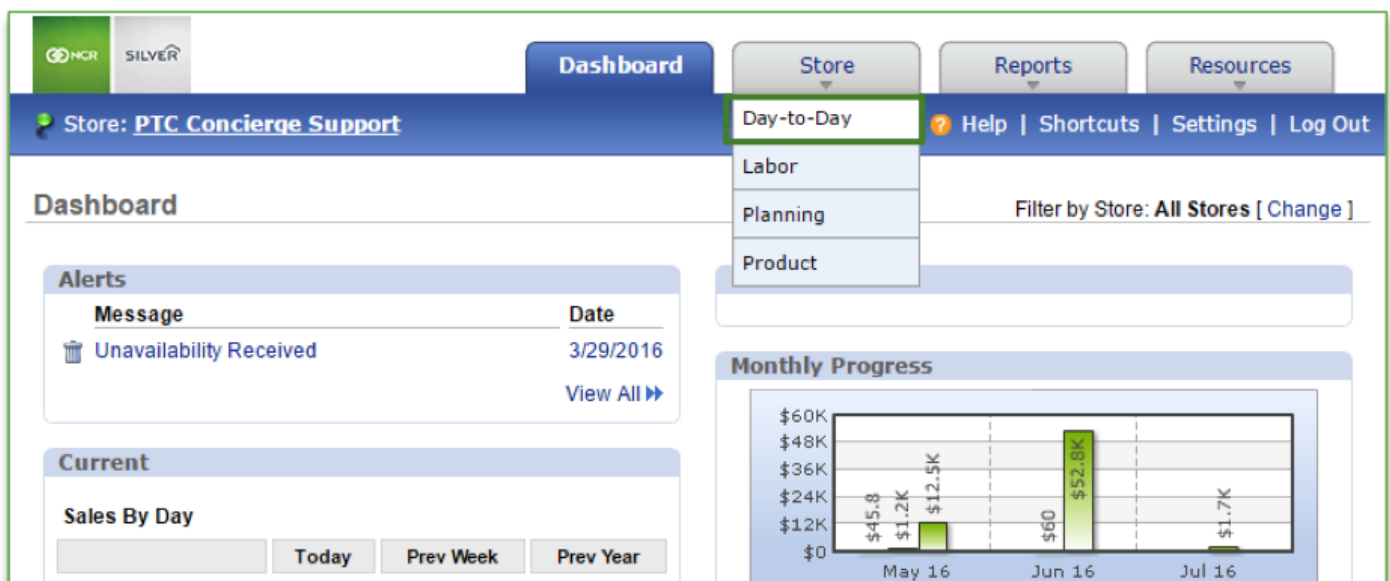
In this module, you will learn about:

- How to edit sales via the Day to Day calendar platform

Which URL is Right for You?

The *Edit Sales* feature is typically used when sales need to be adjusted for a specific day or set of days. It can also be used to add notes for selected days.

To edit sales you will need to navigate to the Day-to-Day calendar within the Store Management platform.



To Edit Sales

1. Click on the day you wish to edit to bring up more detailed information

Day-to-Day ⓘ ▢ More Options

◀ Apr **May 2016** Jun ▶

Sun	Mon	Tue	Wed	Thu	Fri	Sat	
May 1 ☁️ \$19.80	2 ☁️ \$634.16	3 ☁️ \$10.94	4 ☁️ \$145.42	5 ☁️ \$225.50	6 ☁️ \$63.34	7 ☁️	Week's Total = \$1,099.16
8 ☁️ \$9.99	9 ☁️ \$5.00	10 ☁️ \$51.85	11 ☁️ \$440.35	12 ☁️ \$7,188.09	13 ☁️ \$2,495.64	14 ☁️	Week's Total = \$10,190.92
15 ☁️	16 ☁️ \$-10.00	17 ☁️ \$309.97	18 ☁️ \$121.97	19 ☁️ \$147.26	20 ☁️ \$0.00	21 ☁️	Week's Total = \$569.20

2. From the window that opens, click **Edit** in the bottom left corner of the window

Friday, 5/13/2016 Options

Net Sales	\$2,495.64	[View P. Mix] [View Breakdown] [Hourly Sales]	Becoming Sunny 78° / 54°
Transaction Count	18		
Average Ticket	\$138.65		
Labor %	0.7%		
Notes	N/A		

Close

Edit

- This will bring up a box that allows you to enter the necessary changes and/or add notes for the day

The screenshot shows a dialog box titled "Friday, 5/13/2016" with a close button (X) in the top right corner. The dialog is divided into two main sections. The left section contains three fields: "Sales" with a value of 2,695.64, "Transaction Count" with a value of 19, and "Notes" with the text "Catered event added sales to prior total of \$2,495.64". The right section, titled "Options", displays the weather "Becoming Sunny" with a sun and cloud icon and the temperature "78° / 54°". At the bottom of the dialog, there are three buttons: "Cancel" on the left, "Save" in the center, and "Close" on the right.

- Click **Save** when done

Related Topics

[Upload Sales Data](#)

[Sales Data Snapshot](#)

[Options \(for additional management\)](#)

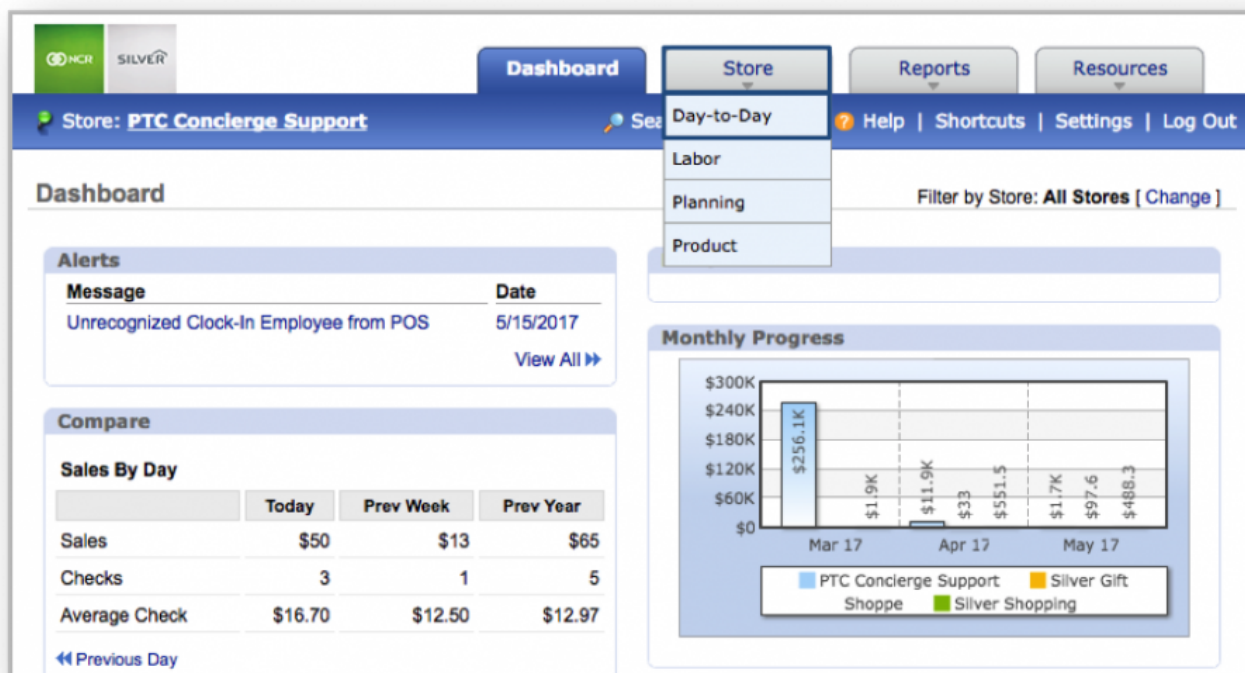
[View Sales Totals](#)

Sales Data Snapshot

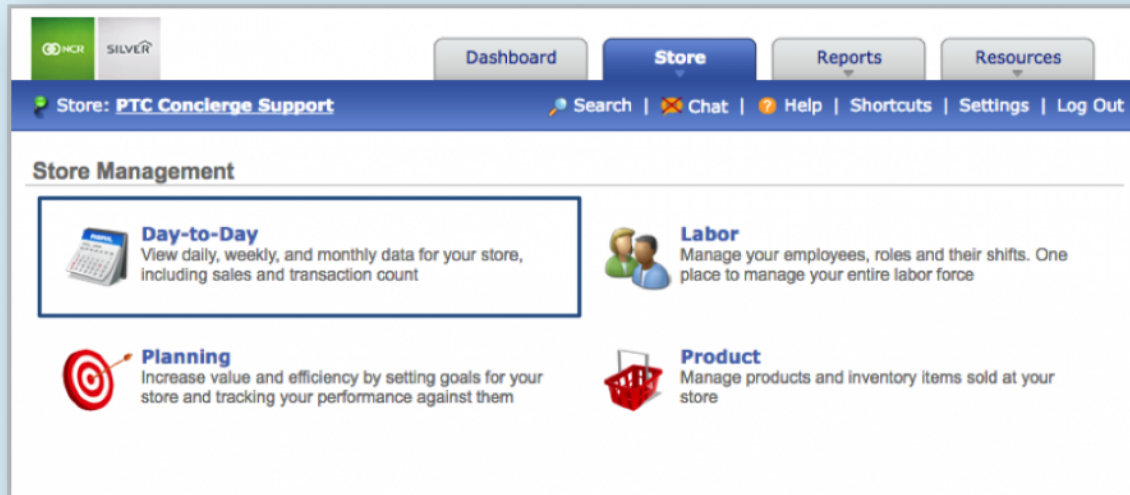
The purpose of this section is to illustrate the additional features that are available to you for viewing additional information for specific days within the Day-to-Day snapshot.

Sales Data Snapshot

STEP 1: From your Dashboard view, mouse over the **Store** tab and click **Day-to-Day**.

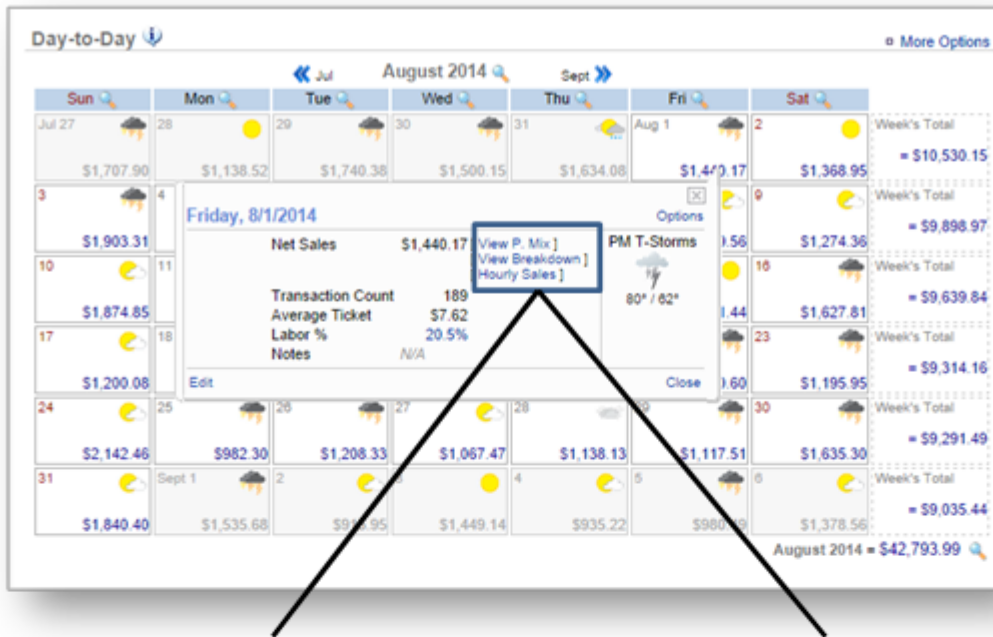


* **Hint:** You can also access **Day-to-Day** by clicking on the **Store** tab and then on **Day-to-Day** from the Store Management screen.



STEP 2: When looking at sales data for a specific day, you will have the option to view additional information for that day, such as *Product Mix*, *Net Sales* and *Hourly Breakdown*. To view more detailed information for *Product Mix*, click **Full Product Report** at the bottom right corner of that window. For more detailed information regarding *Hourly Sales*, click **More Details** at the bottom right corner of that window to

go the full report.



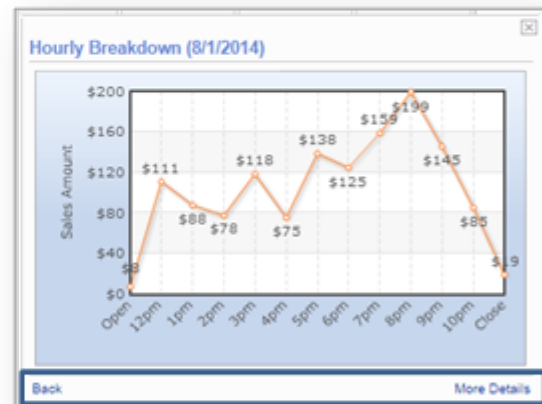
View P. Mix

Hourly Sales

Friday, 8/1/2014

Item	Quantity	Sales	% (Sales)
By Weight - One RG Cup	78	\$359.42	25.0%
By Weight - One LG Cup	48	\$236.74	16.4%
By Weight - Two RG Cups	25	\$207.04	14.4%
By Weight - Three RG Cups	15	\$176.90	12.3%
By Weight - Two LG Cups	17	\$149.58	10.4%
Parfait - One RG Cup	9	\$56.00	3.9%
By Weight - One XLG Cup	4	\$38.61	2.7%
By Weight - Cone	8	\$36.29	2.5%
By Weight - Three LG Cups	2	\$32.56	2.3%
Smoothie - RG Strawberry Banan	6	\$26.70	1.9%
Other	68	\$120.33	8.4%

Back Full Product Report



View Breakdown

Friday, 8/1/2014

Description	Total
Gross Sales	\$1,569.78
Discounts	(\$0.00)
Sales Tax	(\$129.61)
Net Sales	\$1,440.17

Back Close

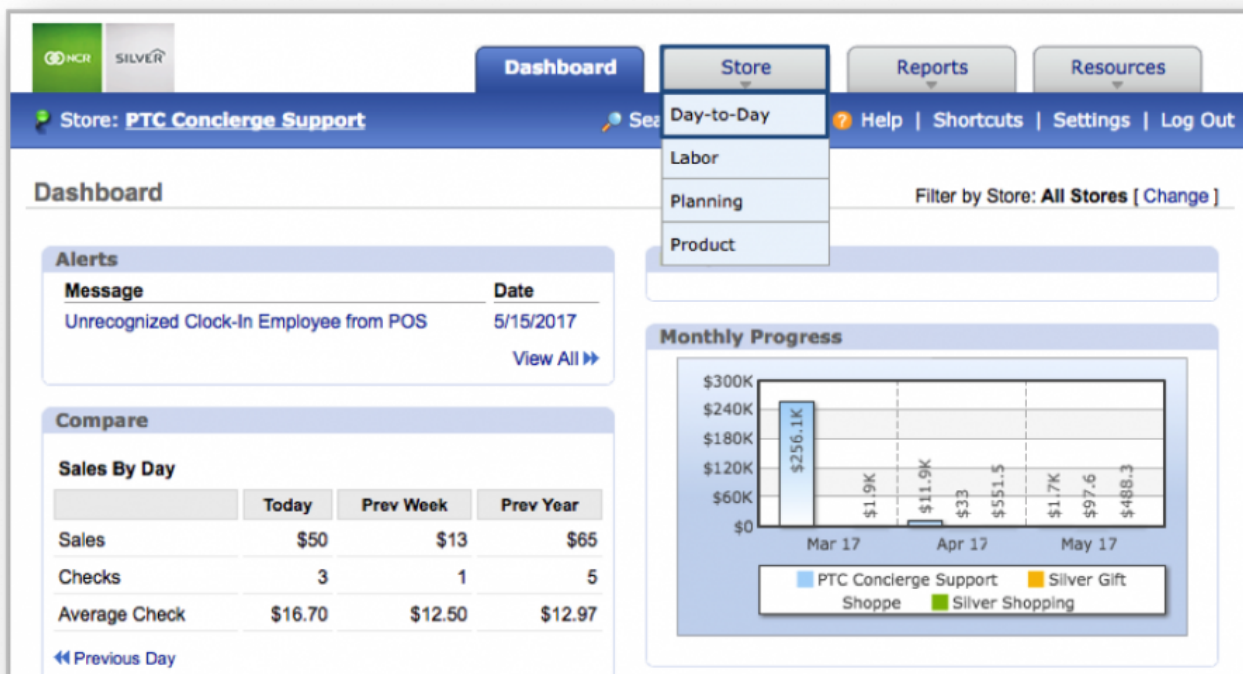
Related Topics[Upload Sales Data](#)[Edit Sales](#)[Options \(for additional management\)](#)[View Sales Totals](#)

Options

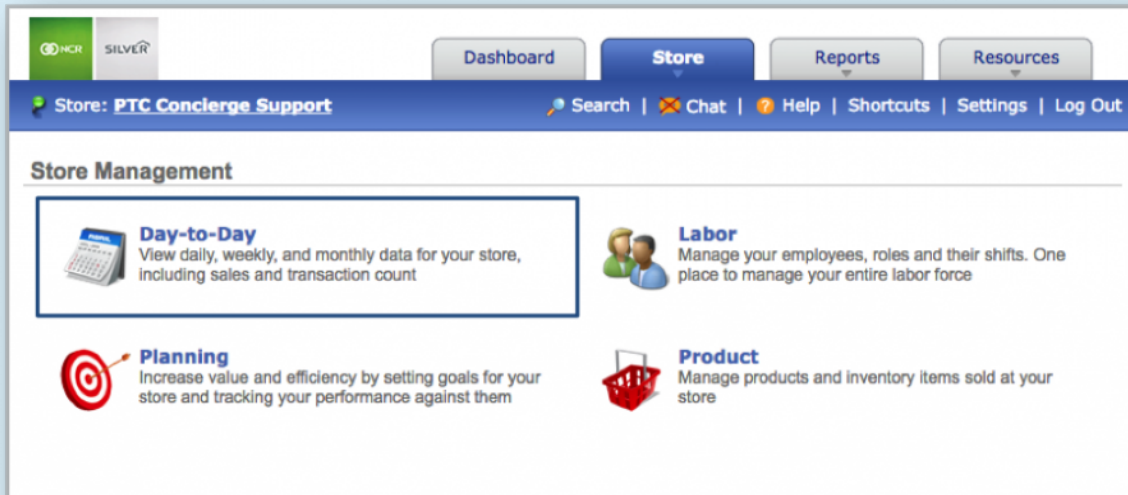
The purpose of this section is to illustrate how to navigate through the options for adjusting daily settings, uploading a product mix, viewing an hourly sales report or viewing scheduled employees for specific days within the Day-to-Day snapshot.

Options

STEP 1: From your Dashboard view, mouse over the **Store** tab and click **Day-to-Day**.



* **Hint:** You can also access **Day-to-Day** by clicking on the **Store** tab and then on **Day-to-Day** from the Store Management screen.



STEP 2: Click **Options** at the top right to adjust *Daily Settings*, *Upload a Product Mix*, *View an Hourly Sales Report* or *View Scheduled Employees*.

The screenshot shows the 'Day-to-Day' report interface. At the top, there's a navigation bar with 'Jul', 'August 2014', and 'Sept'. Below this is a calendar grid showing days from Sunday to Saturday. Each day cell displays a date, weather icon, and sales amount. For example, Sunday, Jul 27 shows \$1,707.90. A modal window titled 'Friday, 8/1/2014' is open, showing a list of options: 'Day Settings', 'Upload Product Mix', 'View Hourly Sales Report', and 'View Scheduled Employees'. An arrow points from the 'Options' button in the top right of the calendar to the modal window.

Day	Sales	Weather
Sun Jul 27	\$1,707.90	Cloudy
Mon Jul 28	\$1,138.52	Sunny
Tue Jul 29	\$1,740.38	Cloudy
Wed Jul 30	\$1,500.15	Cloudy
Thu Jul 31	\$1,634.08	Cloudy
Fri Aug 1	\$1,440.17	Cloudy
Sat Aug 2	\$1,368.95	Sunny

Week's Total = \$10,530.15

Friday, 8/1/2014

- Net Sales \$1,440.17 [View P. Mix] [View Breakdown] [Hourly Sales]
- Transaction Count 189
- Average Ticket \$7.62
- Labor % 20.5%

Options

- Day Settings
- Upload Product Mix
- View Hourly Sales Report
- View Scheduled Employees

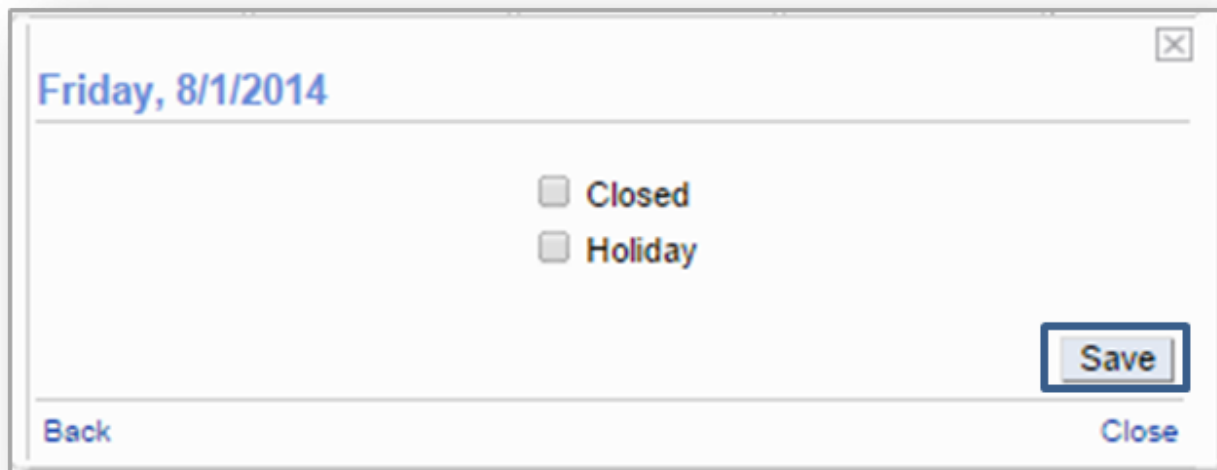
Back Close

Day Settings



Click to see it in action

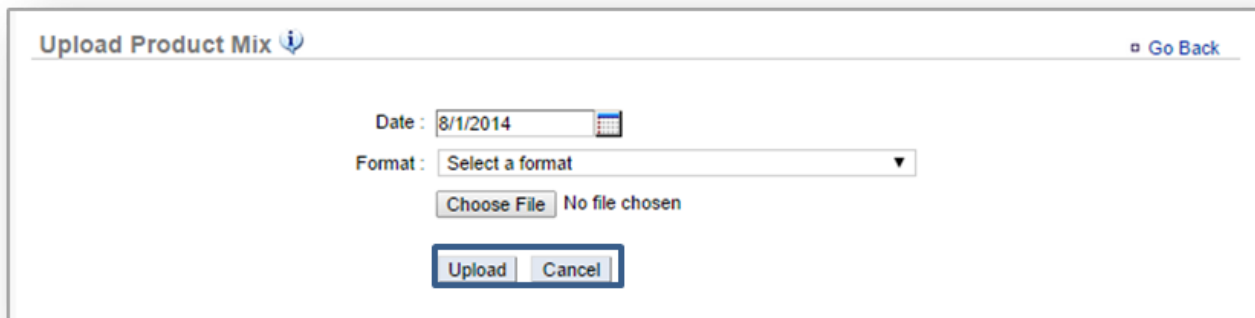
To adjust daily settings, click **Day Settings**. From the window that opens, click **Closed** and/or **Holiday** and then Save.



The screenshot shows a window titled "Friday, 8/1/2014" with a close button in the top right corner. Inside the window, there are two checkboxes: "Closed" and "Holiday", both of which are currently unchecked. At the bottom right, there is a "Save" button. At the bottom left, there is a "Back" link, and at the bottom right, there is a "Close" link.

Upload Product Mix

To upload a product mix, click Upload Product Mix. From the window that opens, select the desired date and choose your format. Next, click* _Choose File_* to upload your file from your computer and click **Upload**.

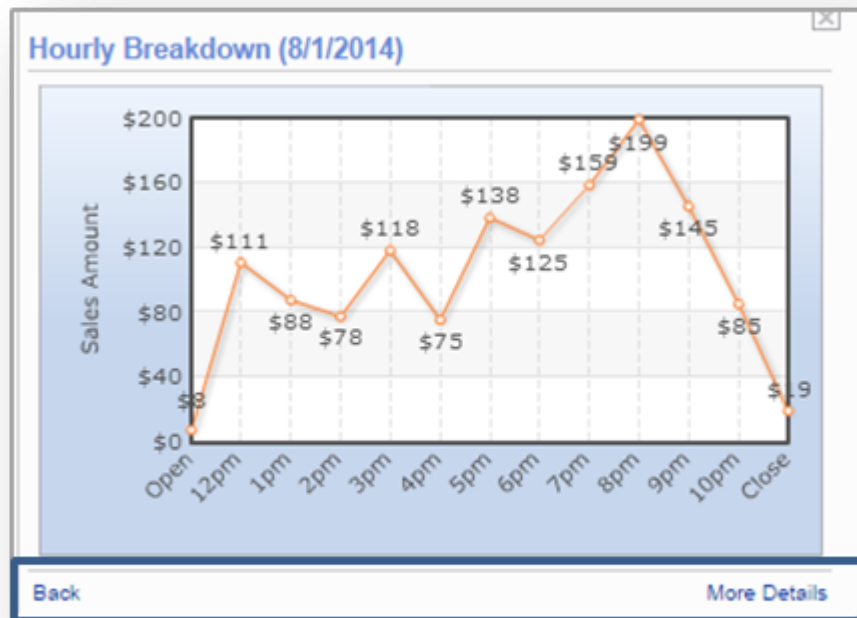


The screenshot shows a window titled "Upload Product Mix" with a help icon and a "Go Back" link in the top right corner. Inside the window, there is a "Date" field with the value "8/1/2014" and a calendar icon. Below the date field is a "Format" dropdown menu with the text "Select a format". Below the format dropdown is a "Choose File" button and the text "No file chosen". At the bottom, there are "Upload" and "Cancel" buttons.

View Hourly Sales Report

To view your hourly sales report, click **View Hourly Sales Report**. A snapshot of your hourly sales will

appear. Click **More Details** to view more detailed information.



View Scheduled Employees

To view that employees that were/are scheduled for a specific day, click **View Scheduled Employees**. A snapshot of your scheduled employees will appear. Click **More Details** to access your entire team roster and to view more detailed information.

Time Card

Employee	In	Out	Total Hours
John Smith	8:00 AM	10:57 AM	2.95
Jane Smith	9:30 AM	4:20 PM	6.83
Mike Smith	10:00 AM	3:30 PM	5.50
Tom Smith	2:00 PM	6:01 PM	4.02
Steve Smith	5:32 PM	11:35 PM	6.05
Robert Smith	6:09 PM	11:35 PM	5.43
Total Hours			30.78

[Back](#) [More Details](#)

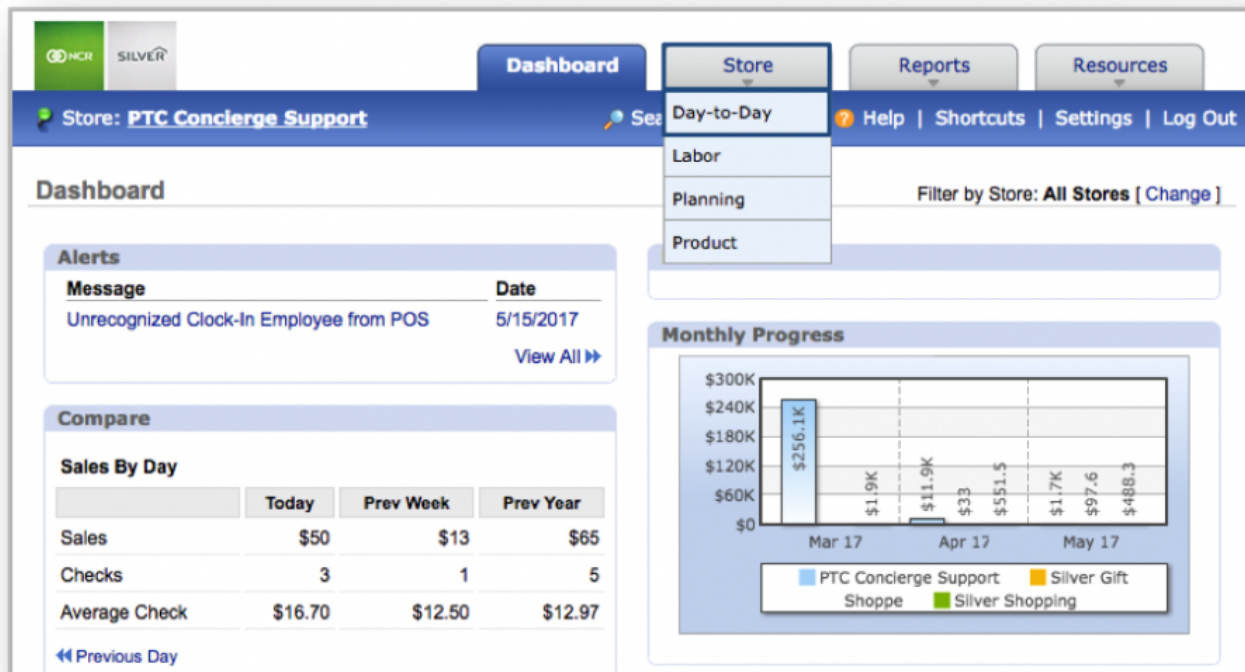
Related Topics[**Upload Sales Data**](#)[**Edit Sales**](#)[**Sales Data Snapshot**](#)[**View Sales Totals**](#)

View Sales Totals

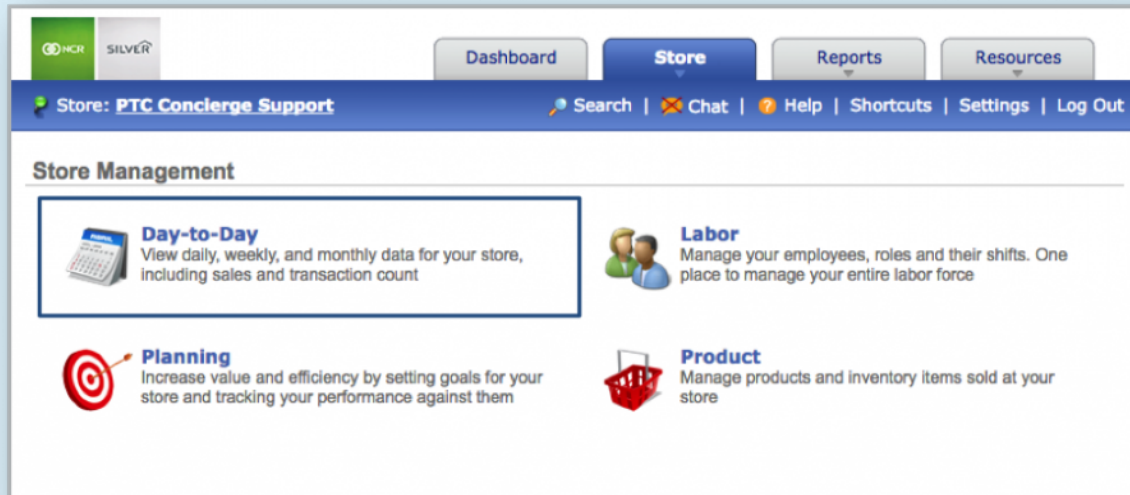
The purpose of this section is to illustrate how to view additional information for sales totals within the Day-to-Day snapshot.

Viewing Sales Totals

From your Dashboard view, mouse over the **Store** tab and click **Day-to-Day**.



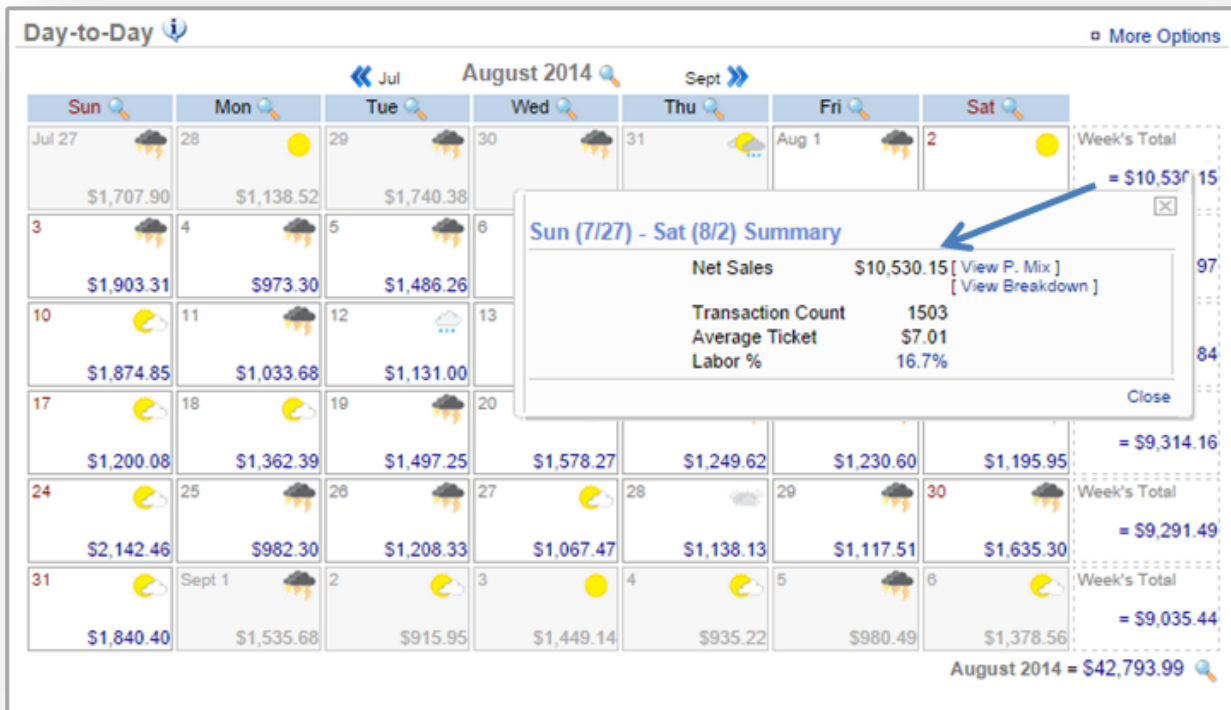
* **Hint:** You can also access **Day-to-Day** by clicking on the **Store** tab and then on **Day-to-Day** from the Store Management screen.



Weekly Totals

Click on a week to the right to view that week's sales totals. You will have the option to *View Product Mix*

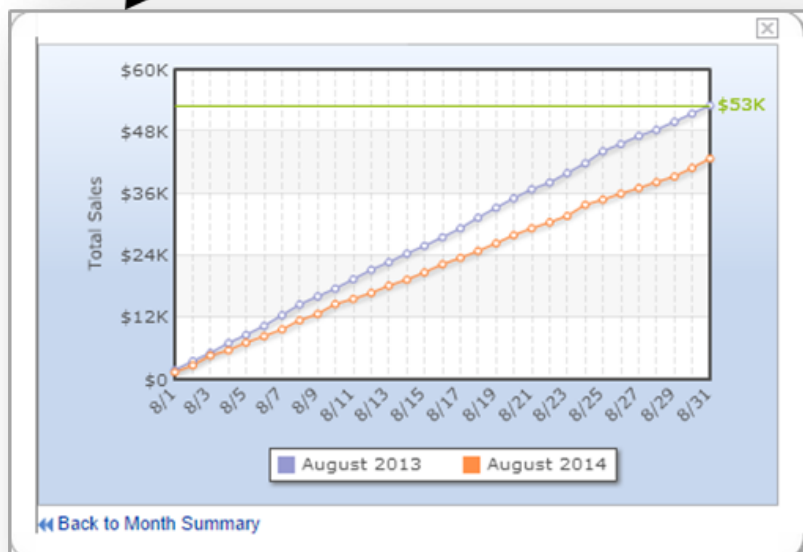
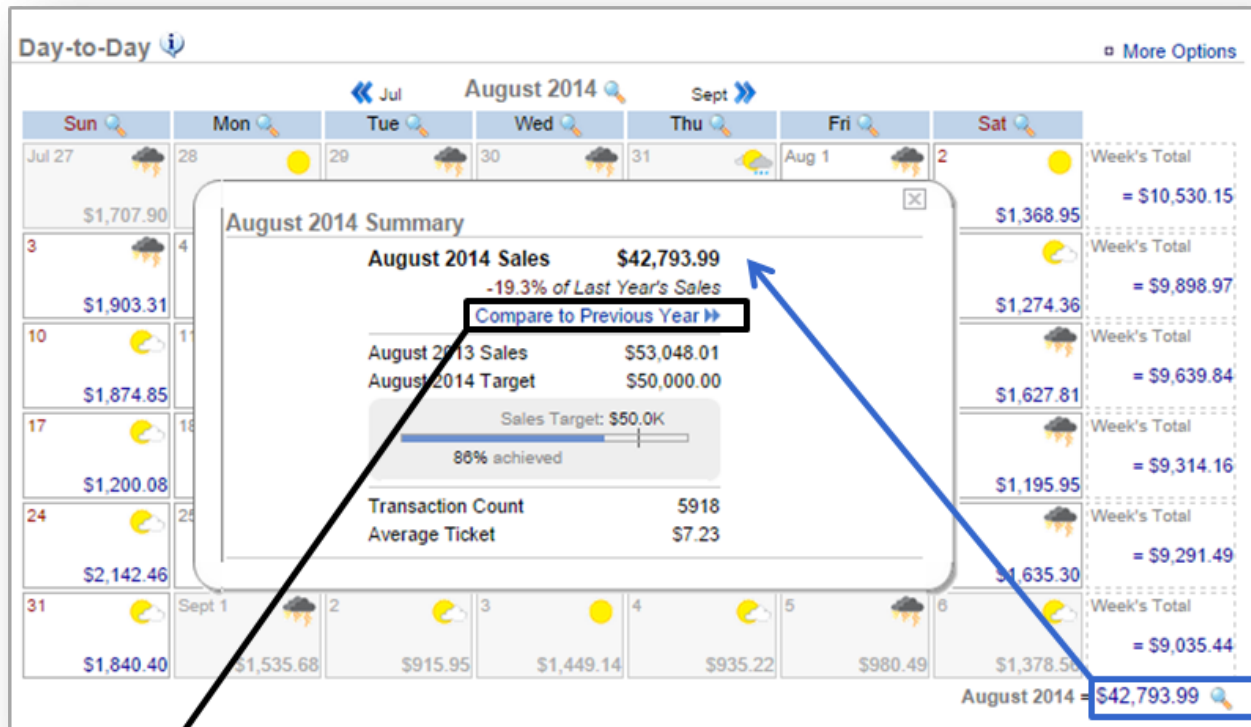
and *Hourly Breakdown* by clicking on these links at the top right corner of the window the appears.



Monthly Total

Click on the monthly sales total at the bottom right corner of the screen to view the monthly *Summary*. You

can compare this total to last year's sales by clicking **Compare to Previous Year**.



Related Topics

[Upload Sales Data](#)

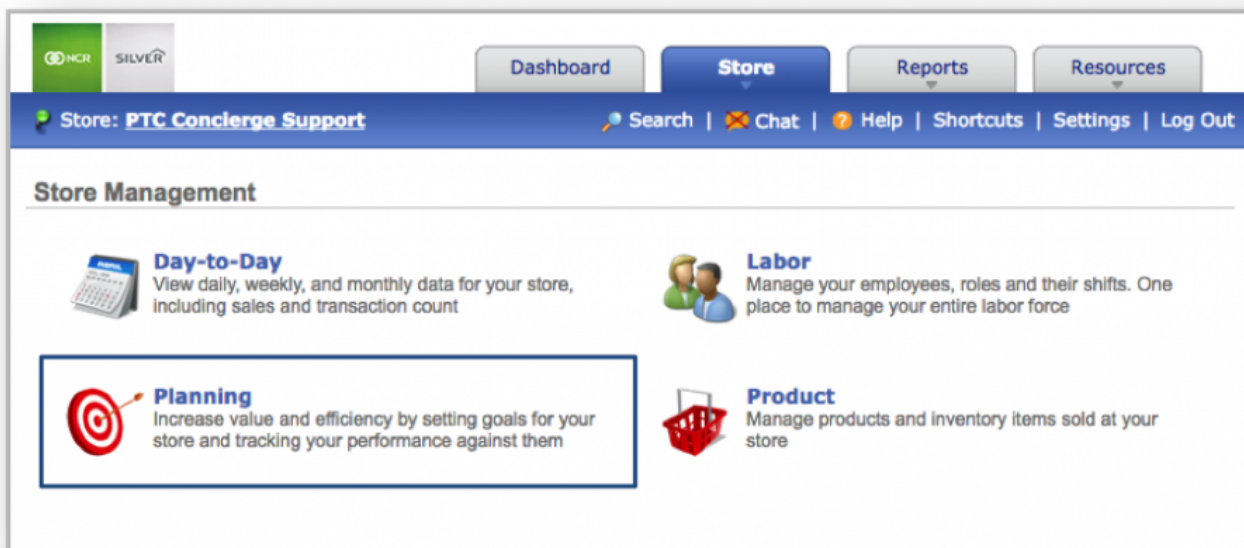
Edit Sales

Sales Data Snapshot

Options (for additional management)

Store Planning

Effective store planning allows you to set specific sales goals and track progress of those goals by month, period or year. For more information on how to set a sales target, click [here!](#)



Set Sales Target

In this module, you will learn about:

- How to set a sales target by Week, Period, Month or Year

Setting Sales Goals

To set a sales goal you will need to navigate to the **Store Planning** module, click **Sales Target** and then select the target you wish to set.

Dashboard

Store: **PTC Concierge Support**

Alerts

Message	Date
Unavailability Received	3/29/2016

View All

Current

Sales By Day

Today Prev Week Prev Year

Monthly Progress

Filter by Store: All Stores [Change]

Day-to-Day Labor **Planning** Product

Help | Shortcuts | Settings | Log Out

Store Planning [Go Back](#)

Sales Target
Set sales goals for your store and monitor your performance against them

Labor Target
Set labor goals for your store and monitor your performance against them

A green arrow points from the 'Sales Target' section to the 'Sales Target' screen below.

Sales Target [Go Back](#)

Sales Target by Week

Sales Target by Period

Sales Target by Month

Sales Target by Year

A green arrow points from the 'Sales Target by Week' option to the 'To Set a Sales Goal by Week' section below.

To Set a Sales Goal by Week

1. Select **Sales Target by Week** from the Sales Target screen
2. Select **Click to set Sales Target** for the week for which you wish to set a target
3. Enter the sales target and click **Save**

Weekly Sales Target Go Back			
Week	Sales Target (\$)	Sales Amount (\$)	Difference (\$)
6/26/2016 - 7/2/2016	Click to set Sales Target	\$830.47	N/A
7/3/2016 - 7/9/2016	Click to set Sales Target	\$512.84	N/A
7/10/2016 - 7/16/2016	Click to set Sales Target	\$757.76	N/A
7/17/2016 - 7/23/2016	Click to set Sales Target	\$1,477.07	N/A
7/24/2016 - 7/30/2016	Click to set Sales Target	\$446.55	N/A
7/31/2016 - 8/6/2016	Click to set Sales Target	\$117.20	N/A
8/7/2016 - 8/13/2016	Click to set Sales Target	\$0.00	N/A
8/14/2016 - 8/20/2016	Click to set Sales Target	\$0.00	N/A
8/21/2016 - 8/27/2016	Click to set Sales Target	\$0.00	N/A
8/28/2016 - 9/3/2016	Click to set Sales Target	\$0.00	N/A
9/4/2016 - 9/10/2016	Click to set Sales Target	\$0.00	N/A

To Set a Sales Goal by Period

1. Select **Sales Target by Period** from the Sales Target screen
2. Select **Click to set Sales Target** for the period you wish to set a target for
3. Enter the sales target and click **Save**

Period Sales Target Go Back			
Period	Sales Target (\$)	Sales Amount (\$)	Difference (\$)
2/21/2016 - 3/19/2016	Click to set Sales Target	(\$3,315,689.25)	N/A
3/20/2016 - 4/16/2016	Click to set Sales Target	\$5,594.34	N/A
4/17/2016 - 5/14/2016	\$12,000.00	\$15,136.40	+\$3,136.40
5/15/2016 - 6/11/2016	\$5,000.00	\$1,761.27	-\$3,238.73
6/12/2016 - 7/9/2016	Click to set Sales Target	\$52,945.20	+\$50,945.20
7/10/2016 - 8/6/2016	Click to set Sales Target	\$2,798.58	N/A
8/7/2016 - 9/3/2016	Click to set Sales Target	\$0.00	N/A
9/4/2016 - 10/1/2016	Click to set Sales Target	\$0.00	N/A
10/2/2016 - 10/29/2016	Click to set Sales Target	\$0.00	N/A
10/30/2016 - 11/26/2016	Click to set Sales Target	\$0.00	N/A
11/27/2016 - 12/24/2016	Click to set Sales Target	\$0.00	N/A

To Set a Sales Goal by Month

1. Select **Sales Target by Month** from the Sales Target screen
2. Select **Click to set Sales Target** for the week you wish to set a target for
 - a. Enter the sales target in the open cell; **OR**

- b. If you have prior year sales for the month you select, you have the option to select **Suggestion**. This will expand additional options
 - i. Click the drop down arrow next to **Add** to select a percentage increase
 - ii. Select **Click to use suggested target** to autofill the open cell
 3. Click **Save**

Monthly Sales Target Go Back

Month	Sales Target (\$)	Actual Sales (\$)	Difference (\$)
March 2016	N/A	\$-3,314,568.88	N/A
April 2016	N/A	\$6,390.18	N/A
May 2016	\$4,363.25	\$12,742.52	+\$8,379.27
June 2016	N/A	\$52,781.43	N/A
July 2016		\$3,353.98	-\$5,418.41
August 2016		\$124.85	N/A
September 2016		\$0.00	N/A
October 2016		\$0.00	N/A
November 2016		\$0.00	N/A
December 2016		\$0.00	N/A
January 2017		\$0.00	N/A
February 2017		\$0.00	N/A

Sales Target May 2016

Sales Target: 4,363.25

Suggestion Save Cancel

Suggestion Based on Past Sales

Last Year's Sales \$3,966.59

Add +10% (Click % to change) \$396.66

Suggested Sales Target \$4,363.25

Click to use suggested target

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To Set a Sales Goal by Year

1. Select **Sales Target by Year** from the Sales Target screen
2. Select **Click to set Sales Target** for the year you wish to set a target for
 - a. Enter the sales target in the open cell; **OR**
 - b. If you have prior year sales for the year you select, you have the option to select **Suggestion**. This will expand additional options
 - i. Click the drop down arrow next to **Add** to select a percentage increase
 - ii. Select **Click to use suggested target** to autofill the open cell
3. Click **Save**
 - a. Once a yearly goal has been set, you can view a per month breakdown by clicking **Monthly Breakdown** to the right of the year you want to view

Yearly Sales Target

[Go Back](#)

Year	Sales Target (\$)	Actual Sales (\$)	Difference (\$)	
2011	N/A	\$0.00	N/A	Monthly Breakdown >>
2012	N/A	\$0.00	N/A	Monthly Breakdown >>
2013	N/A	\$0.00	N/A	Monthly Breakdown >>
2014	N/A	\$0.00	N/A	Monthly Breakdown >>
2015	N/A	N/A	N/A	Monthly Breakdown >>
2016	Click to edit	N/A	N/A	Monthly Breakdown >>
2017	Click to edit	N/A	N/A	

Sales Target for 2016

Sales Target:

[Save](#) [Cancel](#)

Suggestion Based on Past Sales

2015 Sales \$248,936.38

Add + 10% [Click % to change](#) \$24,893.64

Suggested Sales Target \$273,830.02

[Click to use suggested target](#)

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Yearly Sales Target Breakdown

[Go Back](#)

Month	Sales Target (\$)	Actual Sales (\$)	% of Target	vs. Prev Year (%)
January 2016	\$22,819.17	\$21,458.24	94.0%	N/A
February 2016	\$22,942.89	\$32,679.26	142.4%	N/A
March 2016	\$21,969.25	\$-3,314,568.88	-15,087.3%	N/A
April 2016	\$49,680.28	\$6,390.18	12.9%	+\$82.6%
May 2016	\$57,015.08	\$12,742.52	22.3%	+\$221.2%
June 2016	\$125,367.98	\$52,781.43	42.1%	+\$512.9%
July 2016	\$124,224.55	\$3,353.98	2.7%	-\$59.9%

Month	Sales Target (\$)	Previous Year (\$)
August 2016	\$1,715,168.49	\$111,321.93
September 2016	\$354,203.73	\$22,989.37
October 2016	\$287,170.03	\$18,638.59
November 2016	\$220,359.12	\$14,302.27
December 2016	\$882,091.92	\$57,251.62

Summary 2016

Sales Target \$273,830

Months Remaining 5

% Growth Required N/A

Set Labor Target

In this module, you will learn:

- How to set a labor target

Setting Labor Targets

You will have the ability to set multiple labor targets and for any date range(s).

To set a labor target you will need to navigate to the **Store Planning** module and click **Labor Target**.

The screenshot shows the NCR Silver dashboard for the store 'PTC Concierge Support'. The top navigation bar includes 'Dashboard', 'Store', 'Reports', and 'Resources'. The 'Store' dropdown menu is open, showing options: 'Day-to-Day', 'Labor', 'Planning' (highlighted with a green box), and 'Product'. A green arrow points from the 'Planning' option down to the 'Labor Target' module in the 'Store Planning' section below. The 'Store Planning' section contains two modules: 'Sales Target' and 'Labor Target' (highlighted with a green box). The 'Labor Target' module description is: 'Set labor goals for your store and monitor your performance against them'.

To Set a Labor Target

1. To set a target, click **More Options** and **New Target**
2. Enter the desired labor target percentage in the labor target cell

3. Select a start date and end date for the target
4. Click the days you wish to apply this target to
 - a. You can set multiple targets over the same time period but for different days
5. Click **Save**

Labor Target

Date Range : 8/3/2016 to 9/2/2016 [Update](#)

[Go Back](#) [More Options](#)

[New Target](#)

Start Date	End Date	Days of the Week	Labor % Target
Any target already set within the selected date range will appear here.			

Labor Target [Go Back](#)

Set Labor Target

Labor Target %: 15

Start Date: 8/1/2016

End Date: 8/31/2016

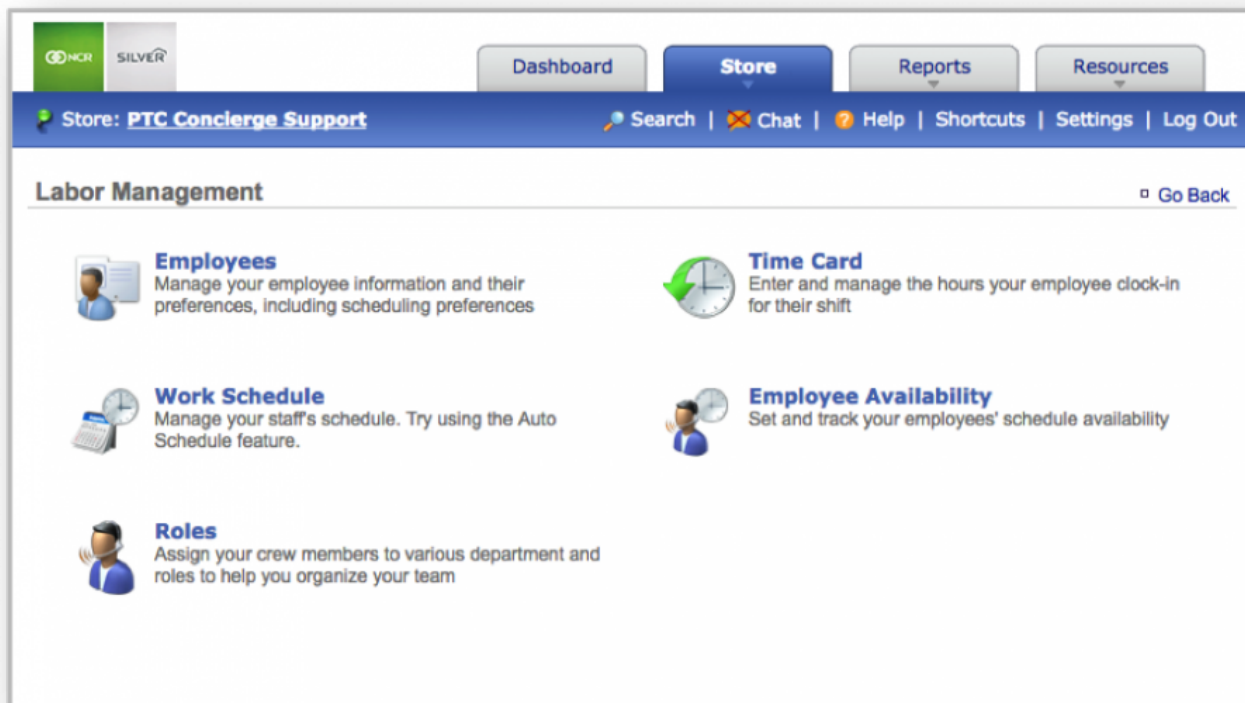
Target applies to:

- ☐ Sunday
- ☒ Monday
- ☒ Tuesday
- ☒ Wednesday
- ☒ Thursday
- ☒ Friday
- ☐ Saturday

[Save](#) [Cancel](#)

Labor Management

Effective labor management can help to reduce the overhead of daily administrative tasks by quickly managing your human resources needs, staff scheduling, labor tracking, payroll processing and integration through the NCR Console platform.



In this section you will find the following resources:

General

New Users: How to add new employees to the system.

Manage Existing Users: How to manage an existing employee.

Creating a new Department, Position or Task: How to create a new Department, Position or Task.

Employee Notes: How to add notes for an employee.

Additional Employee Information: How to input additional employee information, such as pay rate, start date, etc...

Roles & Responsibilities: How to manage Department, Position and Task categories.

User Permissions: How to adjust visibility permissions for your employees.

Employee Availability

Requesting Time Off: How employees request time off.

Managing Time Off Requests: How to manage time off requests.

Creating a Work Schedule

Creating a Work Schedule: How to create a work schedule.

Add Note for Current Week: How to add a note for the current work week.

Communicating Schedules: How to share work schedules with your team.

Time Card

Export a Time Card: How to export an employee's time card.

Import a Time Card: How to import an employee's time card.

Training

Employee Training: How to assign course work, certification tests and view progress.

New User

In this module, you will learn:

- How to create new users (employees) in Console

Creating New Users

To create a new user you will need to navigate to the **Labor Management** module and click **Employees**.

The screenshot displays the NCR Silver console interface. At the top, the 'Dashboard' tab is selected, and the store name 'PTC Concierge Support' is visible. A dropdown menu is open under the 'Store' tab, showing options: 'Day-to-Day', 'Labor', 'Planning', and 'Product'. The 'Labor' option is highlighted with a green box. A green arrow points from this box to the 'Employees' section in the 'Labor Management' module below. The 'Labor Management' module contains several options: 'Employees' (highlighted with a green box), 'Time Card', 'Work Schedule', 'Employee Availability', and 'Roles'. The 'Employees' section is described as 'Manage your employee information and their preferences, including scheduling preferences'.

Dashboard

Store: **PTC Concierge Support**

Alerts

Message	Date
Unavailability Received	3/29/2016

Current

Sales By Day

Today	Prev Week	Prev Year

Monthly Progress

Month	Progress
May 16	\$45.8K
Jun 16	\$52.8K
Jul 16	\$1.7K

Labor Management

Employees
Manage your employee information and their preferences, including scheduling preferences

Time Card
Enter and manage the hours your employee clock-in for their shift

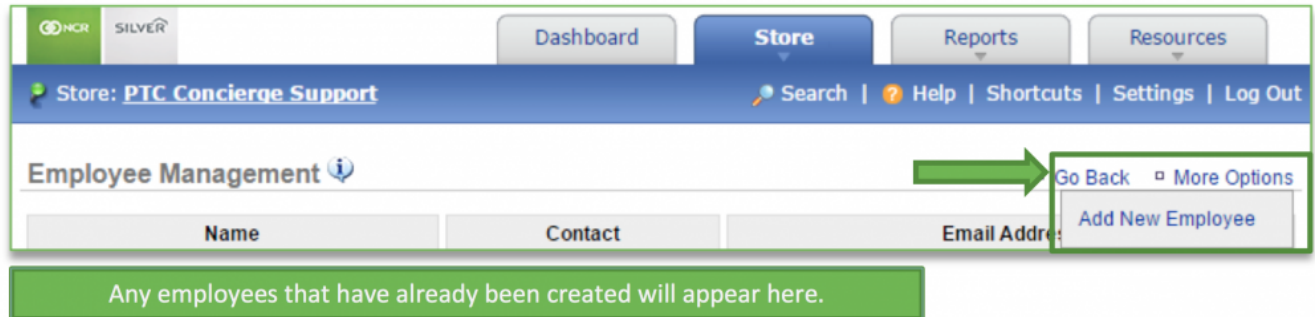
Work Schedule
Manage your staff's schedule. Try using the Auto Schedule feature.

Employee Availability
Set and track your employees' schedule availability

Roles
Assign your crew members to various department and roles to help you organize your team

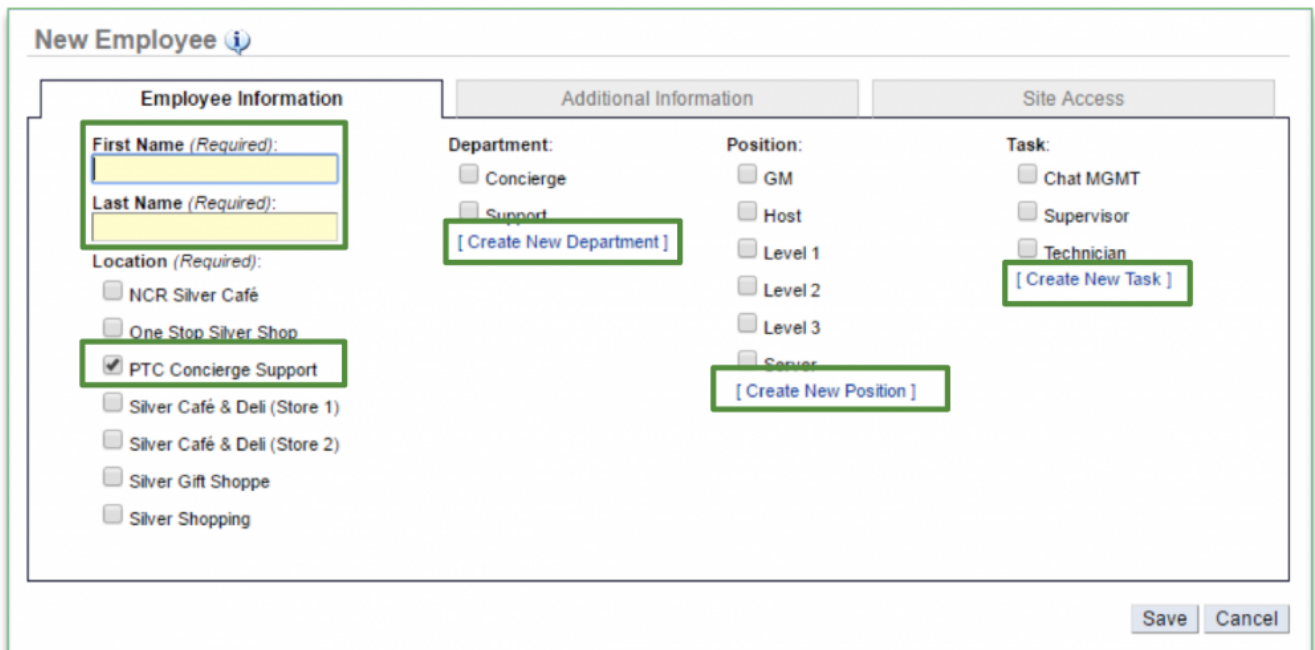
To Add a New User

1. Click **More Options**
2. Click **Add New Employee**



Any employees that have already been created will appear here.

3. Enter the employee first and last name (these are required fields)
4. If you have multiple locations, select the location(s) that the employee should be assigned to
5. If you have created Departments, Positions and Tasks, select the Departments, Positions and Tasks that you wish to assign to the employee
 - a. You will be able to create new Departments, Positions and Tasks from this screen. See the **Creating Roles training module** for more detailed information
6. Click **Save**



NOTE: You can modify employee information at any time after creating them in Console. Refer to the **Managing Existing Users training module** for more detailed information.

There are two additional tabs within the employee record (**Additional Information** and **Site Access**).

- *Additional Information:* Allows you to enter additional details such as email, phone number, pay rate, start date, etc... which supports the communication of schedules and the reporting of labor costs.
- *Site Access:* Allows you to provide limited or full access to the store management portal (store.cimblebox.com) and/or access to the employee portal (employee.cimblebox.com)

Refer to the **Additional Employee Information training module** and the **User Permissions training module** for more detailed information.

The screenshot shows the 'New Employee' form with the 'Employee Inform' tab selected. A green arrow points to the 'Additional Information' tab. The form contains the following fields and options:

- First Name (Required):** Text input field.
- Last Name (Required):** Text input field.
- Location (Required):** Radio button options:
 - ☐ NCR Silver Café
 - ☐ One Stop Silver Shop
 - ☒ PTC Concierge Support
 - ☐ Silver Café & Deli (Store 1)
 - ☐ Silver Café & Deli (Store 2)
 - ☐ Silver Gift Shoppe
 - ☐ Silver Shopping
- Department:** Radio button options:
 - ☐ Concierge
 - ☐ Support
 - [\[Create New Department \]](#)
- Position:** Radio button options:
 - ☐ GM
 - ☐ Host
 - ☐ Level 1
 - ☐ Level 2
 - ☐ Level 3
 - ☐ Server
 - [\[Create New Position \]](#)
- Task:** Radio button options:
 - ☐ Chat MGMT
 - ☐ Supervisor
 - ☐ Technician
 - [\[Create New Task \]](#)

At the bottom right, there are 'Save' and 'Cancel' buttons.

[Click here](#) for more information about creating a new Department, Position or Task.

Related Topics:

[Managing Existing Users](#)

[Inactivate an Employee](#)

[Delete an Employee](#)

[Creating a new Department, Position or Task](#): How to create a new Department, Position or Task.

[Importing Employee Information via the Unrecognized Clock-In Alert](#)

[Adding Employee Notes](#)

[Adding Additional Employee Information](#)

Roles & Responsibilities**Adjusting or Setting User Permissions**

Existing Users

In this module, you will learn about:

- How to manage existing employee information

Managing Existing Employee Information

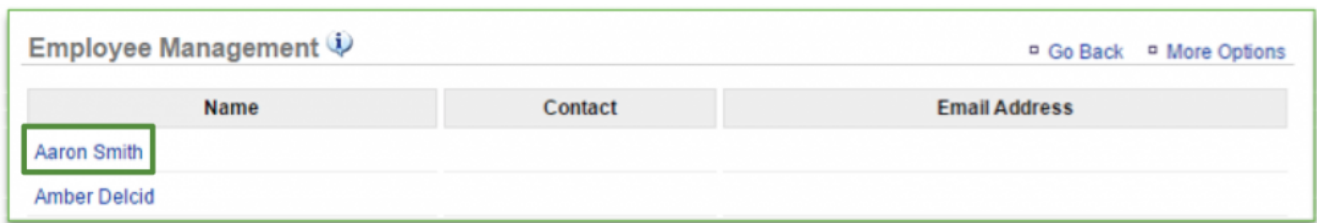
To manage existing employee information you will need to navigate to the **Labor Management** module and click **Employees**.

The screenshot shows the NCR Silver dashboard for a store named 'PTC Concierge Support'. The top navigation bar includes 'Dashboard', 'Store', 'Reports', and 'Resources'. A dropdown menu is open under 'Store', showing options: 'Day-to-Day', 'Labor' (highlighted with a green box), 'Planning', and 'Product'. A green arrow points from the 'Labor' option to the 'Employees' tile in the 'Labor Management' section below. The 'Labor Management' section contains several tiles: 'Employees' (highlighted with a green box), 'Time Card', 'Work Schedule', 'Employee Availability', and 'Roles'. The 'Employees' tile description is 'Manage your employee information and their preferences, including scheduling preferences'. The 'Time Card' tile description is 'Enter and manage the hours your employee clock-in for their shift'. The 'Work Schedule' tile description is 'Manage your staff's schedule. Try using the Auto Schedule feature.' The 'Employee Availability' tile description is 'Set and track your employees' schedule availability'. The 'Roles' tile description is 'Assign your crew members to various department and roles to help you organize your team'.

Month	Progress (\$K)
May 16	\$45.8K
Jun 16	\$12.5K
Jul 16	\$1.7K

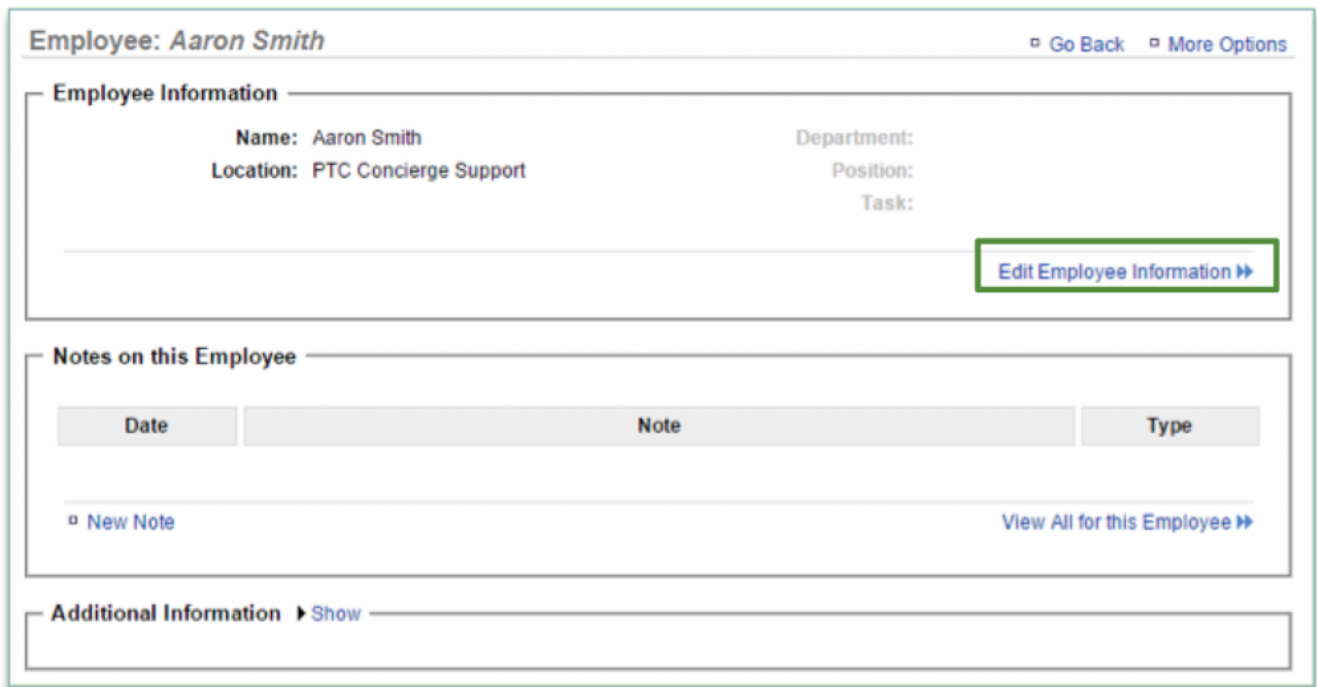
To Edit Employee Information

1. Select the employee you wish to edit information for



The screenshot shows the 'Employee Management' interface. At the top, there is a header bar with the title 'Employee Management' and an information icon. To the right of the header are two links: 'Go Back' and 'More Options'. Below the header is a table with three columns: 'Name', 'Contact', and 'Email Address'. The first row of the table has 'Aaron Smith' in the 'Name' column, which is highlighted with a green box. The second row has 'Amber Delcid' in the 'Name' column.

2. Click **Edit Employee Information**



The screenshot shows the 'Employee: Aaron Smith' detail view. At the top, there is a header bar with the title 'Employee: Aaron Smith' and an information icon. To the right of the header are two links: 'Go Back' and 'More Options'. Below the header is a section titled 'Employee Information'. This section contains a form with the following fields: 'Name' (filled with 'Aaron Smith'), 'Location' (filled with 'PTC Concierge Support'), 'Department' (empty), 'Position' (empty), and 'Task' (empty). To the right of the 'Task' field is a button labeled 'Edit Employee Information' with a right-pointing arrow, which is highlighted with a green box. Below the 'Employee Information' section is a section titled 'Notes on this Employee'. This section contains a table with three columns: 'Date', 'Note', and 'Type'. Below the table is a link labeled 'New Note' and a link labeled 'View All for this Employee' with a right-pointing arrow. At the bottom of the page is a section titled 'Additional Information' with a 'Show' link.

3. Make the adjustments you need to make throughout the employee record

4. Click **Save**

Edit Employee: Aaron Smith

Employee Information	Additional Information	Site Access
First Name (Required): <input type="text" value="Aaron"/> Last Name (Required): <input type="text" value="Smith"/> Status: <input type="button" value="Active"/>	Department: <input type="checkbox"/> Concierge <input type="checkbox"/> Support [Create New Department]	Position: <input type="checkbox"/> GM <input type="checkbox"/> Host <input type="checkbox"/> Level 1 <input type="checkbox"/> Level 2 <input type="checkbox"/> Level 3 <input type="checkbox"/> Server [Create New Position]
Location (Required): <input type="checkbox"/> NCR Silver Café <input type="checkbox"/> One Stop Silver Shop <input checked="" type="checkbox"/> PTC Concierge Support <input type="checkbox"/> Silver Café & Deli (Store 1) <input type="checkbox"/> Silver Café & Deli (Store 2) <input type="checkbox"/> Silver Gift Shoppe <input type="checkbox"/> Silver Shopping		Task: <input type="checkbox"/> Chat MGMT <input type="checkbox"/> Supervisor <input type="checkbox"/> Technician [Create New Task]

[Click here](#) for more information about creating new Departments, Positions, and Tasks.

Related Topics:

[Adding New Users to the System](#)

[Inactivate an Employee](#)

[Delete an Employee](#)

[Creating a new Department, Position or Task](#): How to create a new Department, Position or Task.

[Importing Employee Information via the Unrecognized Clock-In Alert](#)

[Adding Employee Notes](#)

[Adding Additional Employee Information](#)

[Roles & Responsibilities](#)

[Adjusting or Setting User Permissions](#)

Inactivate an Employee

In this module, you will learn:

- The purpose of inactivating employees
- How to inactivate employees

The Purpose of Inactivating Employees

You can inactivate an employee at any time. Inactivating an employee will remove them from the work schedule, employee availability schedule, time card view and all labor reports. However, you will still have access to the employee's information and historical data.

There are two reasons you may choose to inactivate an employee:

1. They have been terminated
2. They do not work in your location but support your business and therefore need access to your account(s)
 - a. Inactive employees can still access their Console account, if one has been created for them. You can modify or remove access at any time. See the **User Permissions** training module for more information.

Inactivating an Employee

To inactivate an employee, you will need to navigate to the **Labor Management** module and click **Employees**.

Dashboard

Store: **PTC Concierge Support**

Alerts

Message	Date
Unavailability Received	3/29/2016

View All >>

Current

Sales By Day

Today Prev Week Prev Year

Monthly Progress

Month	Progress
May 16	\$15.8K, \$1.2K, \$12.5K
Jun 16	\$52.8K, \$60
Jul 16	\$1.7K

Labor Management [Go Back](#)

Employees
Manage your employee information and their preferences, including scheduling preferences

Time Card
Enter and manage the hours your employee clock-in for their shift

Work Schedule
Manage your staff's schedule. Try using the Auto Schedule feature.

Employee Availability
Set and track your employees' schedule availability

Roles
Assign your crew members to various department and roles to help you organize your team

To Add a New User

1. Select the employee you wish to inactivate

Employee Management [Go Back](#) [More Options](#)

Name	Contact	Email Address
Aaron Smith		
Amber Delcid		

2. Click **Edit Employee Information**

Employee: Aaron Smith [Go Back](#) [More Options](#)

Employee Information

Name: Aaron Smith
Location: PTC Concierge Support

Department:
Position:
Task:

[Edit Employee Information >>](#)

Notes on this Employee

Date	Note	Type
------	------	------

[New Note](#) [View All for this Employee >>](#)

Additional Information [Show](#)

3. Click the dropdown arrow under **Status**

4. Select **Inactive**

5. Click **Save**

Edit Employee: Aaron Smith

Employee Information **Additional Information** **Site Access**

First Name (Required): Aaron
Last Name (Required): Smith

Status: ▼
Active
Inactive

Department:
☐ Concierge
☐ Support
[\[Create New Department \]](#)

Position:
☐ GM
☐ Host
☐ Level 1
☐ Level 2
☐ Level 3
☐ Server
[\[Create New Position \]](#)

Task:
☐ Chat MGMT
☐ Supervisor
☐ Technician
[\[Create New Task \]](#)

☐ One Stop Silver Shop
☒ PTC Concierge Support
☐ Silver Café & Deli (Store 1)
☐ Silver Café & Deli (Store 2)
☐ Silver Gift Shoppe
☐ Silver Shopping

[Save](#) [Cancel](#)

Related Topics:

[Managing Existing Users](#)

[Delete an Employee](#)

[Creating a new Department, Position or Task](#): How to create a new Department, Position or Task.

[Importing Employee Information via the Unrecognized Clock-In Alert](#)

[Adding Employee Notes](#)

[Adding Additional Employee Information](#)

[Roles & Responsibilities](#)

[Adjusting or Setting User Permissions](#)

Delete an Employee

In this module, you will learn:

- How to delete an employee record

Deleting an Employee

You can delete an employee at any time. Keep in mind that deleting an employee will completely remove them from the system. Any historical information as it pertains to the employee's work schedule, employee availability, and select labor reports will be lost once they have been deleted.

However, you will still have access to historical sales data as it pertains to the employee even after they have been removed from the system.

To delete an employee, you will need to navigate to the **Labor Management** module and click **Employees**.

The screenshot shows the NCR Silver dashboard for a store named "PTC Concierge Support". The navigation menu includes "Dashboard", "Store", "Reports", and "Resources". The "Store" menu is expanded, showing "Day-to-Day", "Labor", "Planning", and "Product". A green box highlights the "Labor" option, and a green arrow points from it to the "Labor Management" section below. The "Labor Management" section includes links for "Employees", "Time Card", "Work Schedule", "Employee Availability", and "Roles". The "Employees" link is highlighted with a green box.

Dashboard

Store: **PTC Concierge Support**

Alerts

Message	Date
Unavailability Received	3/29/2016

View All >>

Current

Sales By Day

Today Prev Week Prev Year

Monthly Progress

Filter by Store: All Stores [Change]

Monthly Progress Chart:

Month	Progress
May 16	\$45.8K
Jun 16	\$52.8K
Jul 16	\$1.7K

Labor Management

Employees
Manage your employee information and their preferences, including scheduling preferences

Time Card
Enter and manage the hours your employee clock-in for their shift

Work Schedule
Manage your staff's schedule. Try using the Auto Schedule feature.

Employee Availability
Set and track your employees' schedule availability

Roles
Assign your crew members to various department and roles to help you organize your team

To Delete an Employee

1. Select the employee you wish to delete

The screenshot shows the "Employee Management" section with a table of employees. The "Name" column is highlighted with a green box, and the name "Aaron Smith" is selected. The "Contact" and "Email Address" columns are also visible.

Employee Management

Go Back More Options

Name	Contact	Email Address
Aaron Smith		
Amber Delcid		

2. Click **More Options**
3. Click **Delete Employee**
 - a. You will be asked to confirm your choice

b. Click **OK**

The screenshot shows the 'Employee: Aaron Smith' page. The 'Employee Information' section displays 'Name: Aaron Smith' and 'Location: PTC Concierge Support'. The 'Notes on this Employee' section has a table with columns 'Date', 'Note', and 'Type'. The 'Additional Information' section is collapsed. A 'More Options' menu is open, showing 'Edit Employee', 'Delete Employee', and 'Add New Employee'. A green arrow points from the 'Delete Employee' option to a confirmation dialog box. The dialog box has the title 'store.cimplebox.com says:' and the message 'Are you sure you want to delete this employee?'. It has 'OK' and 'Cancel' buttons.

Employee: Aaron Smith

More Options

Edit Employee

Delete Employee

Add New Employee

Employee Information

Name: Aaron Smith

Location: PTC Concierge Support

Department:

Position:

Task:

Edit Employee Information >>

Notes on this Employee

Date	Note	Type
New Note		

View All for this Employee >>

Additional Information Show

store.cimplebox.com says:

Are you sure you want to delete this employee?

OK Cancel

Related Topics:

[Managing Existing Users](#)

[Inactivate an Employee](#)

[Creating a new Department, Position or Task](#): How to create a new Department, Position or Task.

[Importing Employee Information via the Unrecognized Clock-In Alert](#)

[Adding Employee Notes](#)

[Adding Additional Employee Information](#)

[Roles & Responsibilities](#)

[Adjusting or Setting User Permissions](#)

New Dept., Position or Task

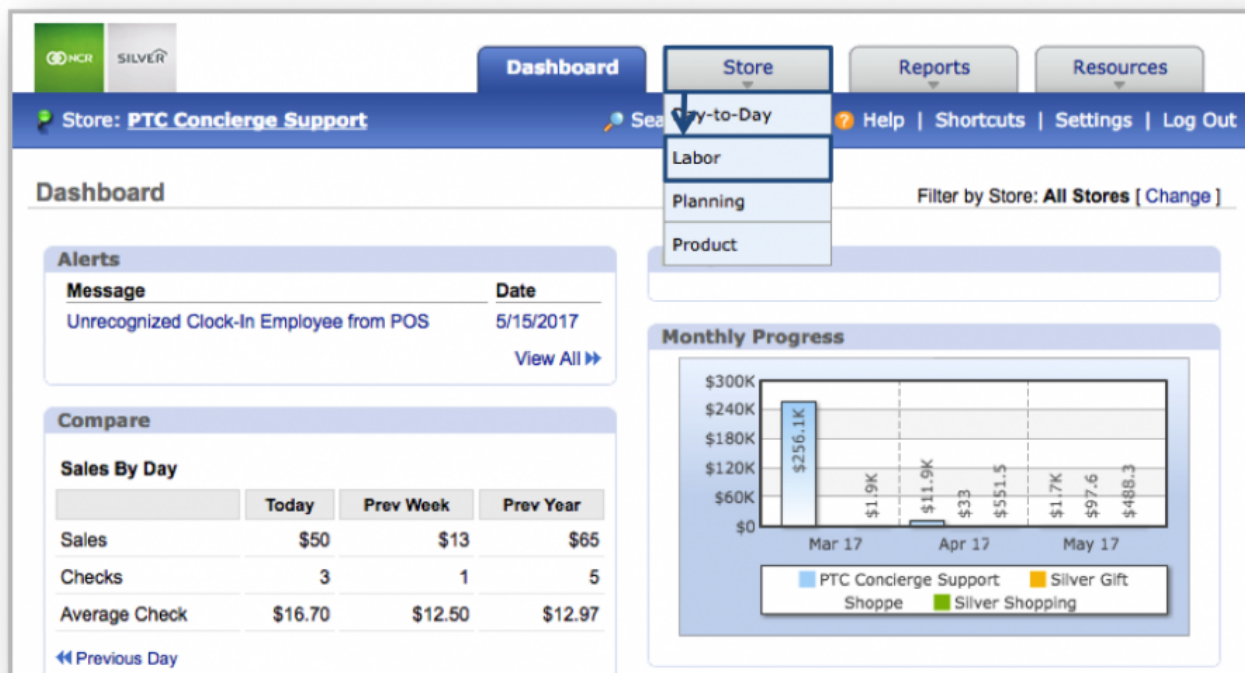
The purpose of this section is to illustrate how to create new Departments, Positions or Tasks.

Creating a New Department, Position or Task

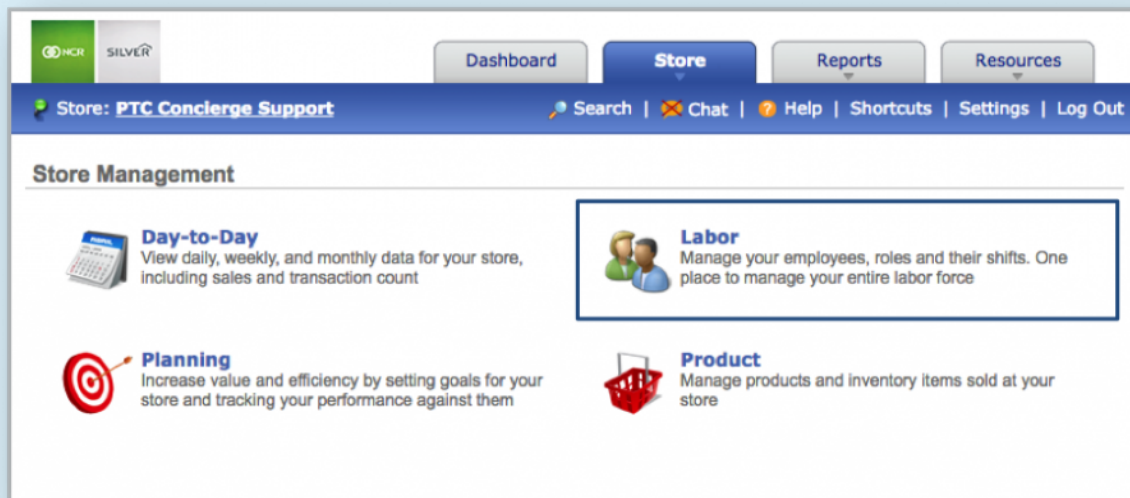
There are two ways to create a new *Department, Position or Task*. You can create one by editing an employee's file or by accessing *Roles & Responsibilities* within the Labor section of the site.

Creating a New Department, Position or Task, via the Roles & Responsibilities platform.

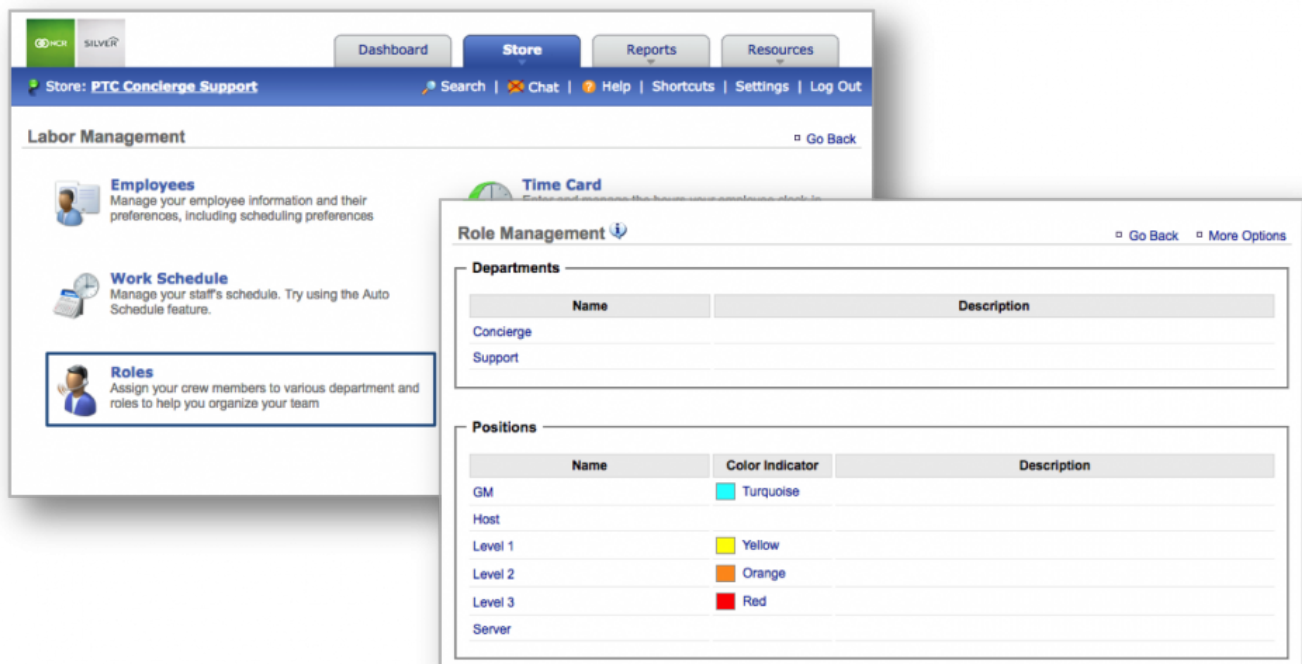
STEP 1: From your Dashboard view, mouse over the **Store** tab and click **Labor**.



* **Hint:** You can also access Labor by clicking on the **Store** tab and then on **Labor** from the Store Management screen.



STEP 2: From the Labor Management screen, click **Roles**, which will take you to the Role Management page.



STEP 3: To create a *New Department, Position or Task*, click **More Options** at the top right corner of the screen and select the desired category (*Department, Position, or Task*).

The screenshot displays the 'Role Management' interface for 'PTC Conclerge Support'. The top navigation bar includes 'Dashboard', 'Store', 'Reports', and 'Resources'. The 'Store' section is active, showing a search bar and links for Chat, Help, Shortcuts, Settings, and Log Out. The 'Role Management' section has a 'Go Back' link and a 'More Options' dropdown menu. The 'More Options' menu is open, showing 'Add New Department', 'Add New Position', and 'Add New Task'.

Departments

Name	Description
Concierge	
Support	

Positions

Name	Color Indicator	Description
GM	Turquoise	
Host		
Level 1	Yellow	
Level 2	Orange	
Level 3	Red	
Server		

Tasks

Name	Description
Chat MGMT	
Supervisor	
Technician	Answer calls, be nice, etc.

STEP 4: Enter the name and description (optional) of the *Department/Position/Task* in the fields that appear and click Save when done. **Note:** You will have the option to assign a color to any *Position* you create.

The screenshot shows the 'New Department' form in the NCR Silver system. The form has a header with the NCR and Silver logos, and navigation tabs for Dashboard, Store, Reports, and Resources. The 'Store' tab is active, and the page title is 'Store: PTC Concierge Support'. Below the header, there is a search bar and links for Chat, Help, Shortcuts, Settings, and Log Out. The main form area is titled 'New Department' and contains the following fields and options:

- Department Name:** A text input field.
- Description:** A larger text input field.
- Add to the following locations:** A section with three checkboxes:
 - ☒ PTC Concierge Support
 - ☐ Silver Gift Shoppe
 - ☐ Silver Shopping

A blue arrow points from the 'PTC Concierge Support' checkbox to a text box that says: 'Be sure to check those locations for which you wish to make new Departments, Positions and Tasks viewable.' At the bottom right of the form are 'Save' and 'Cancel' buttons.

Creating a New Department, Position or Task, via an Employee's file.

STEP 1: From your Dashboard view, mouse over the **Store** tab and click **Labor**.

The screenshot shows the NCR Silver dashboard interface. At the top, there are tabs for **Dashboard**, **Store**, **Reports**, and **Resources**. The **Store** tab is active, and its dropdown menu is open, showing options: **Day-to-Day**, **Labor** (highlighted), **Planning**, and **Product**. The dashboard header includes a search bar, a help icon, and links for **Help**, **Shortcuts**, **Settings**, and **Log Out**. The main content area is titled **Dashboard** and includes a filter for **Store: PTC Concierge Support**. Below this, there are sections for **Alerts** (showing an unrecognized clock-in employee), **Compare** (with a **Sales By Day** table), and **Monthly Progress** (a bar chart comparing sales for PTC Concierge Support, Silver Gift Shoppe, and Silver Shopping across March, April, and May 2017).

Alerts

Message	Date
Unrecognized Clock-In Employee from POS	5/15/2017

[View All](#)

Compare

Sales By Day

	Today	Prev Week	Prev Year
Sales	\$50	\$13	\$65
Checks	3	1	5
Average Check	\$16.70	\$12.50	\$12.97

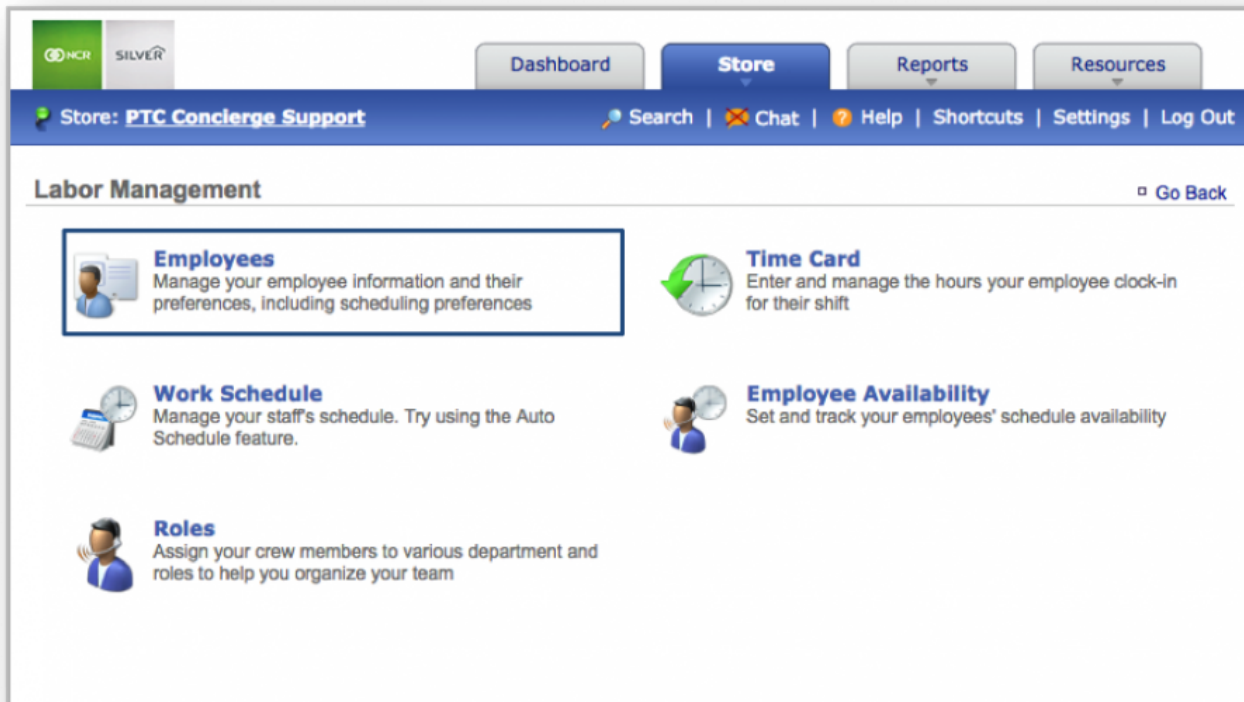
[Previous Day](#)

Monthly Progress

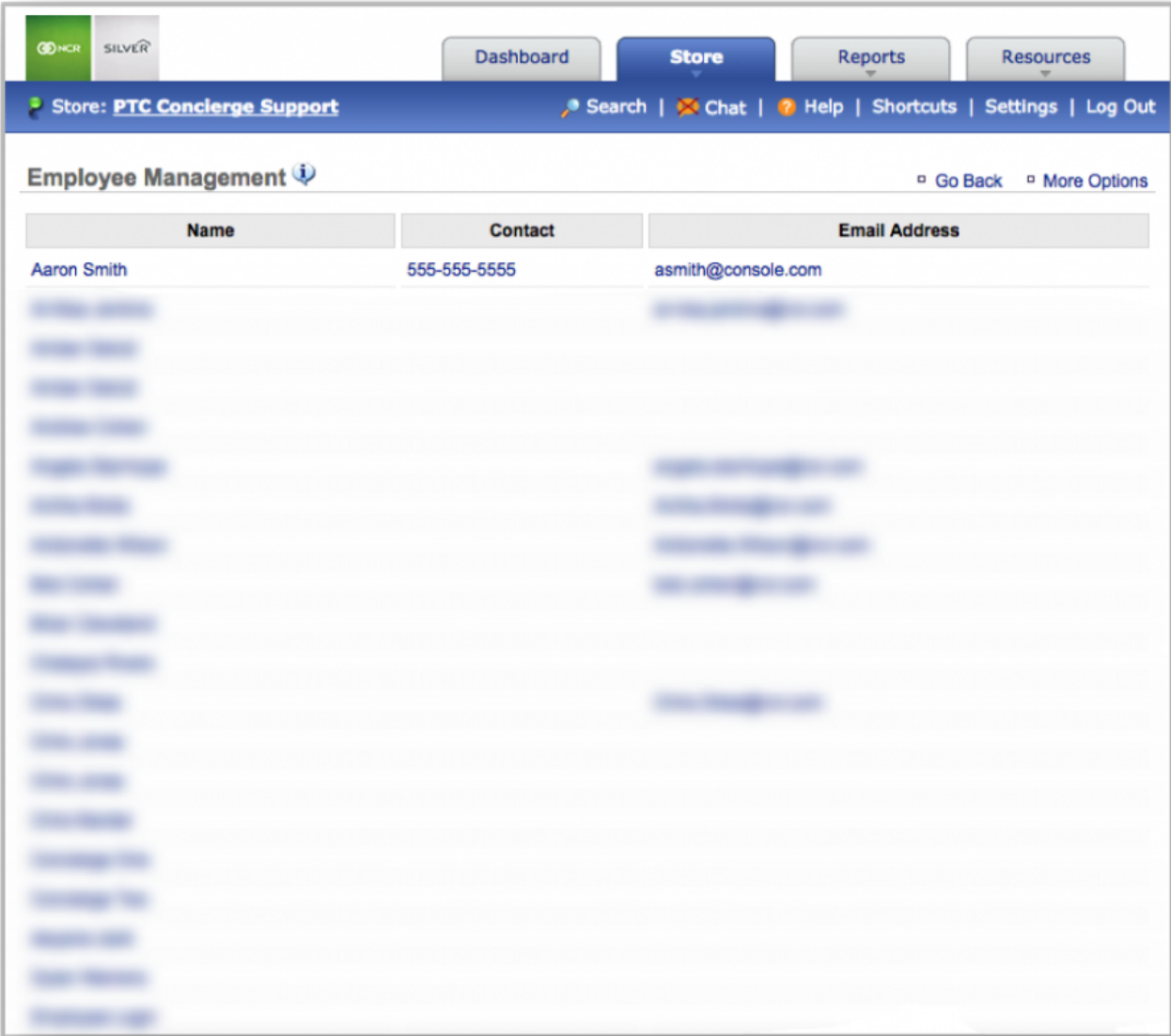
Bar chart showing sales progress for PTC Concierge Support, Silver Gift Shoppe, and Silver Shopping from March 17 to May 17. The Y-axis represents sales in thousands of dollars (\$0 to \$300K).

Month	PTC Concierge Support	Silver Gift Shoppe	Silver Shopping
Mar 17	\$256.1K	\$1.9K	\$1.9K
Apr 17	\$3.3K	\$551.5K	\$1.7K
May 17	\$97.6K	\$488.3K	\$1.7K

STEP 2: From the Labor Management screen, click ***Employees***.



STEP 3: To view information for a specific employee, click on the row with the employee’s name shown. The employee’s name, location, department, position, and tasks will be shown, if previously assigned.



STEP 4: To edit this information, click **Edit Employee Information** in the lower right corner of the top text box. The page will change to show the Edit Employee box.

Employee: Aaron Smith [Go Back](#) [More Options](#)

Employee Information

Name: Aaron Smith **Department:**

Location: PTC Concierge Support (Default)
Silver Gift Shoppe
Silver Shopping **Position:**

Portal Username: asmithncr **Task:**

[Edit Employee Information](#)

Notes on this Employee

Date	Note	Type
8/6/2016	Employee won \$50 gift card for tops sales for the week	Positive

Showing Latest 1 of 1 Notes

[New Note](#) [View All for this Employee](#)

Additional Information [Show](#)

Training [Show](#)

STEP 5: To create a *New Department, Position or Task*, simply click on the “**Create New...**” link at the bottom of the category you wish to edit.

Edit Employee: Aaron Smith

Employee Information	Additional Information	Site Access
First Name (Required): Aaron	Department: <input type="checkbox"/> Concierge <input type="checkbox"/> Support [Create New Department]	Task: <input type="checkbox"/> Chat MGMT <input type="checkbox"/> Supervisor <input type="checkbox"/> Technician [Create New Task]
Last Name (Required): Smith	Position: <input type="checkbox"/> GM <input type="checkbox"/> Host <input type="checkbox"/> Level 1 <input type="checkbox"/> Level 2 <input type="checkbox"/> Level 3 <input type="checkbox"/> Server [Create New Position]	
Status: Active		

[Save](#) [Cancel](#)

- Enter the name of the *Department/Position/Task* in the field that appears
- Click the **+** button to create the *Department/Position/Task*.
- Click the **Save** button to assign the new *Department/Position/Task* to the employee.

- Click **Cancel** to cancel this process and return to the previous screen.

Edit Employee: Aaron Smith

Employee Information	Additional Information	Site Access
First Name (Required): <input type="text" value="Aaron"/> Last Name (Required): <input type="text" value="Smith"/> Status: <input type="button" value="Active"/>	Department: <input type="checkbox"/> Concierge <input type="checkbox"/> Support <input type="text"/> +	Position: <input type="checkbox"/> GM <input type="checkbox"/> Host <input type="checkbox"/> Level 1 <input type="checkbox"/> Level 2 <input type="checkbox"/> Level 3 <input type="checkbox"/> Server <input type="text"/> +
		Task: <input type="checkbox"/> Chat MGMT <input type="checkbox"/> Supervisor <input type="checkbox"/> Technician <input type="text"/> +

✿ You may add as many *Departments, Positions, or Tasks* as you wish.

Related Topics:

[Adding New Users to the System](#)

[Inactivate an Employee](#)

[Delete an Employee](#)

[Importing Employee Information via the Unrecognized Clock-In Alert](#)

[Managing Existing Users](#)

[Adding Employee Notes](#)

[Adding Additional Employee Information](#)

[Roles & Responsibilities](#)

[Adjusting or Setting User Permissions](#)

Unrecognized Clock-In Alert

In this module, you will learn:

- The purpose of the Unrecognized Clock-In alert
- How to process Unrecognized Clock-In alerts

The Purpose of the Unrecognized Clock-In Alert

Employees will clock in and out from the POS for their shifts. The total hours worked, are then reported to Console. Once this happens, you will receive an alert via your Dashboard titled “**Unrecognized Clock-In Employee from POS**”.

This alert is telling you that we are now capturing hours worked for your employees that now need to be imported into Console. It is a one-time process that will only need to occur when new employees are hired and using the system for the first time.

Processing Unrecognized Clock-In Alerts

To process unrecognized clock-in alerts you will need to navigate to the **Dashboard** and click **Unrecognized Clock-In Employee from POS** within the alerts box.

The screenshot shows the NCR Silver dashboard for 'PTC Concierge Support'. The top navigation bar includes 'Dashboard', 'Store', 'Reports', and 'Resources'. A secondary bar contains 'Search', 'Help', 'Shortcuts', 'Settings', and 'Log Out'. The main content area is titled 'Dashboard' and includes a filter for 'All Stores'. On the left, there's a sidebar with 'Alerts' and 'Current' sections. The 'Alerts' section shows a message: 'Unrecognized Clock-In Employee from POS' dated 8/6/2016. A green box highlights this message, and a green arrow points to a detailed alert pop-up. The pop-up contains the following text:

Unrecognized Clock-In Employee from POS

Your attention is needed for the issue below.

There are unknown users found during the import of the time cards from the POS. This typically occurs when this employee is either not created as an employee in CimpleBox or is not properly associated to the POS user.

[Click here](#) to match this user to the correct CimpleBox user.

The 'Current' section on the left includes a 'Sales By Week' table:

	Curr WTD	Prev WTD	Prev Yr WTD
Sales	\$617	\$885	\$102,847
Transactions	47	47	45
Average Check	\$13.14	\$18.83	\$2,285.49

Below the table is a 'Weather Forecast' for 'One Stop Silver Shop, PTC Concierge Support, Silver Gift Shoppe'.

Today (8/6)	Tomorrow (8/7)	Mon (8/8)
93° 74°	91° 73°	87° 72°

A link 'View Full 5-Day Forecast' is provided at the bottom right of the weather section.

1. Click the **Click here** link within the alert

This is a close-up of the alert pop-up from the previous screenshot. It shows the title 'Unrecognized Clock-In Employee from POS' and the explanatory text. The link 'Click here' is highlighted with a green box.

2. Click **Match Employee** to the right of the employee's name(s)
 - a. If you have multiple locations, you will not have to select the location that the employee belongs to. The system will automatically show the store that your employee is assigned to, based on

the POS from which they clock in and out

Unrecognized POS Employees Go Back					
Store	Date	Display Name	Name	POS ID	
PTC Concierge Support	8/6/2016	Lizzy Duncan		5883	Match Employee >>
Silver Shopping	8/6/2016	Kenya Hoover		22333	Match Employee >>
Silver Shopping	8/6/2016	Michael Alberty		20346	Match Employee >>

3. If the employee has already been created within Console, their name will automatically appear to the right of the **Match “...” to CimpleBox User**

Match User Go Back

Match "Lizzy Duncan" to CimpleBox User:

- If the employee has not been created in Console yet, **Select a User** will appear to the right of **Match “...” to CimpleBox User**
- Click the dropdown arrow to the right of User
- Select **Create New Employee**

Match User Go Back

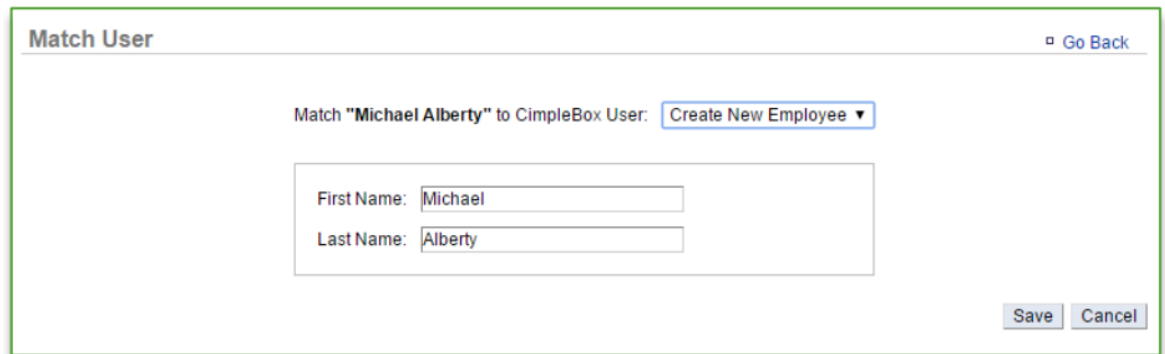
Match "Michael Alberty" to CimpleBox User:

Select a User

Select a User
Create New Employee
 Amber Delcid
 Andrew Cohen
 Angela Stanhope

- The employee's first and last name will auto-populate in the open fields below

- i. First and last name is required



Match User [Go Back](#)

Match "Michael Alberty" to CimpleBox User: Create New Employee ▼

First Name:

Last Name:

Save Cancel

4. Click **Save**

- a. Once you have imported an employee's hours, you will have the ability to edit their record to add additional details such as phone number, email address, pay rate, start date, etc. This can be done via the **Employee Management** portal. Refer to the **Managing Existing Users** training module for more information.

Related Topics:

[Managing Existing Users](#)

[Inactivate an Employee](#)

[Delete an Employee](#)

[Creating a new Department, Position or Task](#): How to create a new Department, Position or Task.

[Adding Employee Notes](#)

[Adding Additional Employee Information](#)

[Roles & Responsibilities](#)

[Adjusting or Setting User Permissions](#)

Employee Notes

In this module, you will learn:

- How to add notes to employee records
- How to view or modify notes that have already been added to an employee record

How to Add Notes to Employee Record

To create a note for an employee you will need to navigate to the **Labor Management** module and click **Employees**.

The screenshot shows the NCR Silver dashboard for 'Store: PTC Concierge Support'. The top navigation bar includes 'Dashboard', 'Store', 'Reports', and 'Resources'. A dropdown menu under 'Store' is open, showing options: 'Day-to-Day', 'Labor', 'Planning', and 'Product'. A green box highlights the 'Labor' option, and a green arrow points from it to the 'Employees' tile in the 'Labor Management' section below. The 'Employees' tile is also highlighted with a green box. Other tiles in the 'Labor Management' section include 'Time Card', 'Work Schedule', 'Employee Availability', and 'Roles'.

Dashboard

Store: **PTC Concierge Support**

Alerts

Message	Date
Unavailability Received	3/29/2016

View All

Current

Sales By Day

Today Prev Week Prev Year

Monthly Progress

Month	Progress
May 16	\$45.8K
Jun 16	\$52.8K
Jul 16	\$1.7K

Labor Management

Employees
Manage your employee information and their preferences, including scheduling preferences

Time Card
Enter and manage the hours your employee clock-in for their shift

Work Schedule
Manage your staff's schedule. Try using the Auto Schedule feature.

Employee Availability
Set and track your employees' schedule availability

Roles
Assign your crew members to various department and roles to help you organize your team

Creating a New Note

1. Select the employee for which you wish to create a note

The screenshot shows the 'Employee Management' section with a table of employees. The table has columns for 'Name', 'Contact', and 'Email Address'. The first row, 'Aaron Smith', is highlighted with a green box. The second row is 'Amber Delcid'.

Employee Management

Name	Contact	Email Address
Aaron Smith		
Amber Delcid		


2. Click **New Note**
3. A blank note will appear in a floating window
4. Enter text for your note
5. Select the note date
6. Select the type of note (e.g. General, Positive or Negative) by clicking the drop down arrow to the right of **Type**
7. Click **Save**


The screenshot displays the 'Employee: Aaron Smith' page. At the top, there are links for 'Go Back' and 'More Options'. Below this is the 'Employee Information' section, which includes fields for Name (Aaron Smith), Location (PTC Concierge Support), Department, Position, and Task. An 'Edit Employee Information' link is at the bottom right of this section. The 'Notes on this Employee' section is partially visible, showing a 'Date' field and a 'New Note' button. A green arrow points from the 'New Note' button to the 'New Note' dialog box. The dialog box has a title bar with a close button. It contains a large text area for the note, a 'Date' field set to '8/6/2016' with a calendar icon, and a 'Type' dropdown menu with options: General (selected), Positive, and Negative. At the bottom right of the dialog are 'Save' and 'Cancel' buttons.


How to View or Modify Existing Employee Notes


To view or modify a note for an employee you will need to navigate to the **Labor Management** module and click **Employees**.


Labor Management [Go Back](#)

**Employees**
Manage your employee information and their preferences, including scheduling preferences

**Time Card**
Enter and manage the hours your employee clock-in for their shift

**Work Schedule**
Manage your staff's schedule. Try using the Auto Schedule feature.

**Employee Availability**
Set and track your employees' schedule availability

**Roles**
Assign your crew members to various department and roles to help you organize your team

1. Select the employee you wish to view or modify a note for

Employee Management [Go Back](#) [More Options](#)

Name	Contact	Email Address
Aaron Smith		
Amber Delcid		

2. Any notes that have been created for the employee will appear
3. Click the note you wish to view or modify

- a. You can also click **View All for this Employee** to view all notes

Employee: Aaron Smith [Go Back](#) [More Options](#)

Employee Information

Name: Aaron Smith	Department:
Location: PTC Concierge Support	Position:
	Task:

[Edit Employee Information >>](#)

Notes on this Employee

Date	Note	Type
8/6/2016	Employee won \$50 gift card for tops sales for the week	Positive

Showing Latest 1 of 1 Notes

[New Note](#) [View All for this Employee >>](#)

Additional Information [Show](#)

[View All for this Employee >>](#)

↓

Employee Notes: Aaron Smith [Go Back](#) [More Options](#)

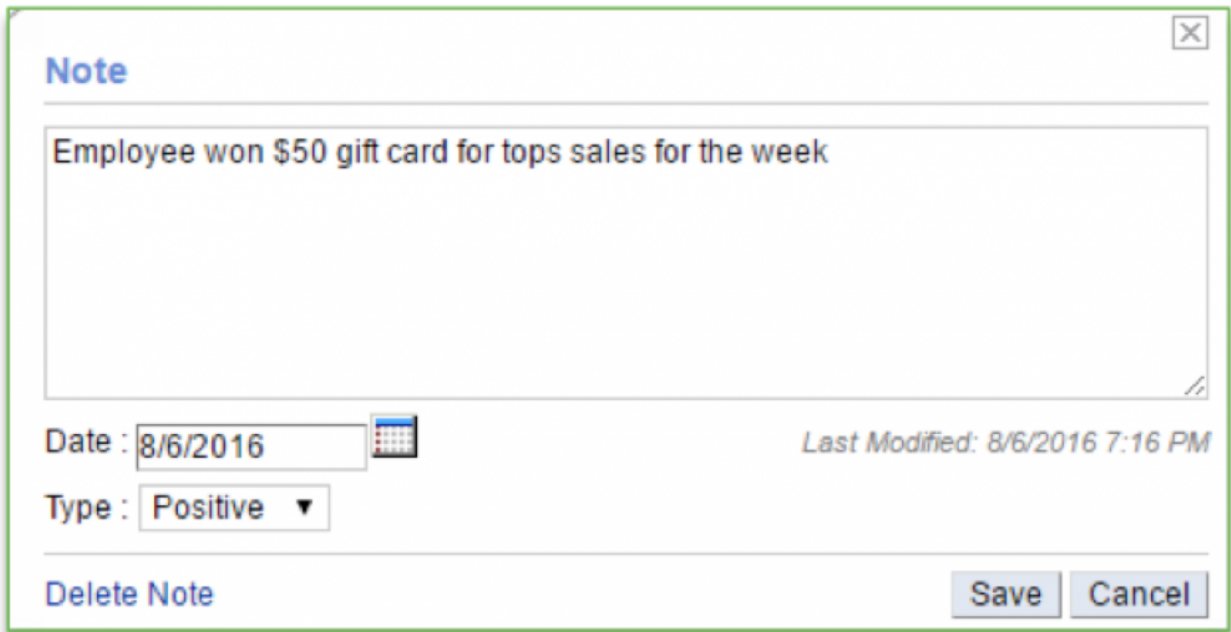
Date	Note	
8/6/2016	Employee won \$50 gift card for tops sales for the week	Positive

[New Note](#)

Note: You can add a new note at any time from this screen by clicking **More Options** and **New Note**.


4. Once you have selected the note you wish to view or modify, it will appear in a floating window

- a. From this window, you can edit the note, select a different note date, change the note type or delete the note



Note

Employee won \$50 gift card for tops sales for the week

Date : 8/6/2016  Last Modified: 8/6/2016 7:16 PM

Type : Positive ▼

Delete Note Save Cancel

5. Click **Save** if you've made changes or the "x" at the top right corner to close the window
 - a. The *Last Modified* date will change if you've made edits to the note

Related Topics:

[Adding New Users to the System](#)

[Inactivate an Employee](#)

[Delete an Employee](#)

[Managing Existing Users](#)

[Creating a new Department, Position or Task](#): How to create a new Department, Position or Task.

[Importing Employee Information via the Unrecognized Clock-In Alert](#)

[Adding Additional Employee Information](#)

[Roles & Responsibilities](#)

[Adjusting or Setting User Permissions](#)

Additional Employee Info.

In this module, you will learn:

- How to add additional information to an employee record
- How to view or edit additional information that has already been created

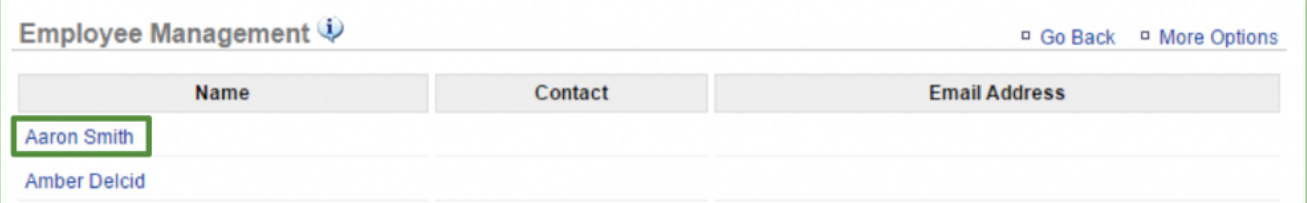
Adding Additional Information

To add additional information to an employee record you will need to navigate to the **Labor Management** module and click **Employees**.

The screenshot displays the NCR Silver dashboard for 'Store: PTC Concierge Support'. The top navigation bar includes 'Dashboard', 'Store', 'Reports', and 'Resources'. A dropdown menu under 'Store' is open, showing 'Day-to-Day', 'Labor', 'Planning', and 'Product'. The 'Labor' option is highlighted with a green box. A green arrow points from this box to the 'Employees' module in the 'Labor Management' section below. The 'Labor Management' section contains several modules: 'Employees' (highlighted with a green box), 'Time Card', 'Work Schedule', 'Employee Availability', and 'Roles'. The 'Employees' module description is: 'Manage your employee information and their preferences, including scheduling preferences'.

Month	Progress (\$K)
May 16	\$45.8K
Jun 16	\$2.35K
Jul 16	\$1.7K

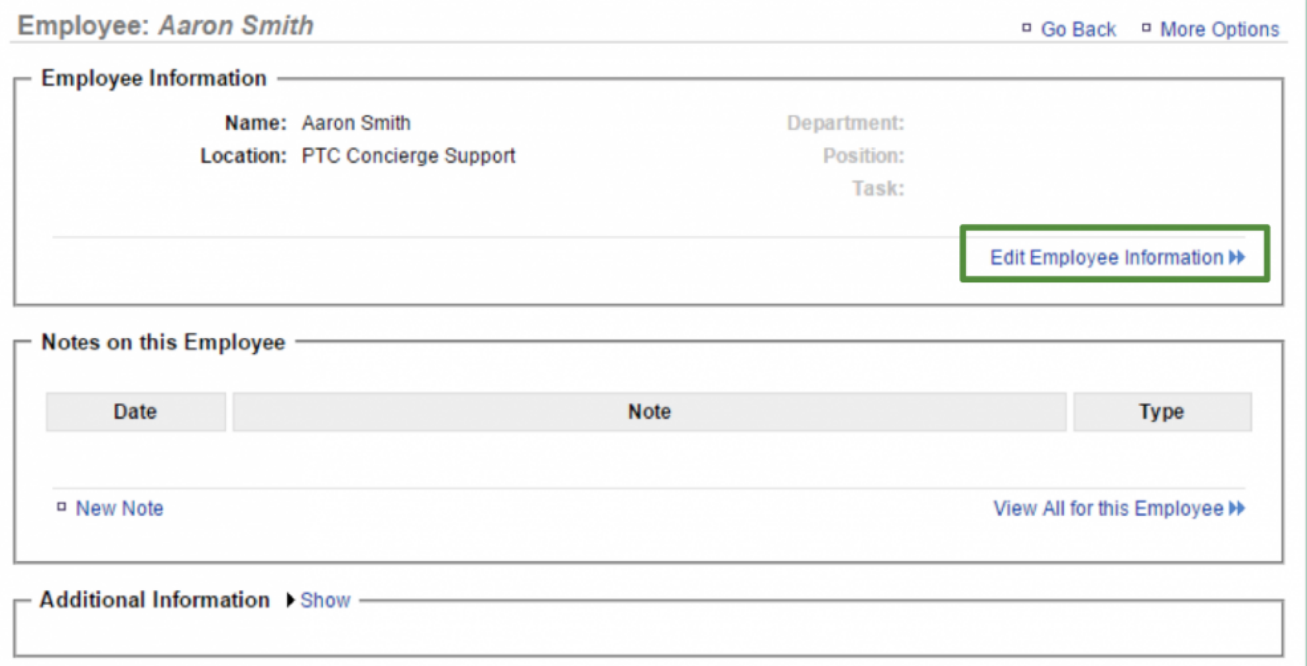
1. Select the employee you wish to add additional information for (*this can also be done during the creation of a new employee*)



The screenshot shows the 'Employee Management' interface. At the top, there is a header bar with the title 'Employee Management' and an information icon. To the right of the header are two links: 'Go Back' and 'More Options'. Below the header is a table with three columns: 'Name', 'Contact', and 'Email Address'. The table contains two rows of data. The first row, 'Aaron Smith', is highlighted with a green border. The second row is 'Amber Delcid'.

Name	Contact	Email Address
Aaron Smith		
Amber Delcid		

2. Click **Edit Employee Information**



The screenshot shows the 'Employee: Aaron Smith' detail page. At the top, there is a header bar with the title 'Employee: Aaron Smith' and an information icon. To the right of the header are two links: 'Go Back' and 'More Options'. Below the header is a section titled 'Employee Information'. This section contains a form with the following fields: 'Name' (filled with 'Aaron Smith'), 'Location' (filled with 'PTC Concierge Support'), 'Department' (empty), 'Position' (empty), and 'Task' (empty). To the right of the 'Task' field is a button labeled 'Edit Employee Information' with a right-pointing arrow. Below the 'Employee Information' section is a section titled 'Notes on this Employee'. This section contains a table with three columns: 'Date', 'Note', and 'Type'. Below the table is a link labeled 'New Note' and a link labeled 'View All for this Employee'. At the bottom of the page is a section titled 'Additional Information' with a 'Show' link.

Employee Information

Name: Aaron Smith
Location: PTC Concierge Support
Department:
Position:
Task:

[Edit Employee Information](#)

Notes on this Employee

Date	Note	Type
------	------	------

[New Note](#) [View All for this Employee](#)

Additional Information [Show](#)

3. Click the **Additional Information** tab

Edit Employee: Aaron Smith

Employee Information | **Additional Information** | **Site Access**

First Name (Required):
Aaron

Last Name (Required):
Smith

Status:
Active ▼

Location (Required):

- ☐ NCR Silver Café
- ☐ One Stop Silver Shop
- ☒ PTC Concierge Support
- ☐ Silver Café & Deli (Store 1)
- ☐ Silver Café & Deli (Store 2)
- ☐ Silver Gift Shoppe
- ☐ Silver Shopping

Department:

- ☐ Concierge
- ☐ Support
- [\[Create New Department \]](#)

Position:

- ☐ GM
- ☐ Host
- ☐ Level 1
- ☐ Level 2
- ☐ Level 3
- ☐ Server
- [\[Create New Position \]](#)

Task:

- ☐ Chat MGMT
- ☐ Supervisor
- ☐ Technician
- [\[Create New Task \]](#)

Save **Cancel**

4. Enter the additional information you wish to add in the open fields to the right of each item. At a minimum, we recommend that you add
- a. Mobile Phone Number and Mobile Service Provider (enables text messaging to communicate the work schedule)
 - i. Standard messaging rates will apply to the employee
 - b. Email Address (allows you to communicate the work schedule)
 - c. Pay Rate Information (allows you to track labor costs)
 - i. You will have the option to enter it based on hourly rate or salary
 - ii. Keep in mind that if you have a salaried employee that works at more than one of your locations, for reporting purposes, their salary will be evenly distributed across all locations based on the number of locations you have
 - d. *Transaction to Employee Ratio* is the number of customers an employee can serve per hour
 - i. Ratio is used to help the system forecast labor and the ratio you enter will vary by employee and job performance

- ii. You can use a starting point of 10-20 and adjust as needed

Edit Employee: Aaron Smith

Employee Information	Additional Information	Site Access
<p>Phone: <input type="text"/></p> <p>Mobile Phone: <input type="text"/></p> <p>Mobile Service Provider: <input type="text" value="Select Provider"/></p> <p>Email Address: <input type="text"/></p> <p>Street Address: <input type="text"/></p> <p>Street Address Line 2: <input type="text"/></p> <p>City: <input type="text"/> State: <input type="text"/></p> <p>Zip: <input type="text"/></p>	<p>Employee #: <input type="text"/></p> <p>Birthday: <input type="text"/></p> <p>Start Date: <input type="text"/></p> <p>Pay Type: <input checked="" type="radio"/> Hourly <input type="radio"/> Salary</p> <p>Hourly Rate: <input type="text"/> Effective Date: <input type="text"/></p> <p>Transaction to Employee Ratio: <input type="text"/></p> <p>Notes: <input type="text"/></p> <p>Emergency Contact: <input type="text"/></p> <p>Contact Relationship: <input type="text"/></p> <p>Emergency Phone: <input type="text"/></p>	


5. Click **Save**


View or Modify Additional Information


To view or modify additional information for an employee record you will need to navigate to the **Labor**


Management module and click **Employees**.


Labor Management [Go Back](#)

**Employees**
Manage your employee information and their preferences, including scheduling preferences

**Time Card**
Enter and manage the hours your employee clock-in for their shift

**Work Schedule**
Manage your staff's schedule. Try using the Auto Schedule feature.

**Employee Availability**
Set and track your employees' schedule availability

**Roles**
Assign your crew members to various department and roles to help you organize your team

Editing Additional Information

1. Select the employee for which you wish to view or modify additional information

Employee Management i			Go Back	More Options
Name	Contact	Email Address		
Aaron Smith				
Amber Delcid				

2. Click **Show** to the right of **Additional Information**

Employee: Aaron Smith [Go Back](#) [More Options](#)

Employee Information

Name: Aaron Smith Department:
Location: PTC Concierge Support Position:
Task:

[Edit Employee Information](#)

Notes on this Employee

Date	Note	Type
New Note		

[View All for this Employee](#)

Additional Information [Show](#)

3. This will expand the window to show any additional information that you have entered for your employee
 - a. Click **Hide** to the right of **Additional Information** to collapse the window
 - b. Click **Edit Additional Information** at the bottom right of the window to edit information for the employee

i. Click **Save**

Additional Information [▶ Hide](#)

Phone:	Employee #: 123456
Mobile Phone: 555-555-5555	Start Date:
Mobile Provider: AT&T	Pay: \$35,000 / Year
Email Address: asmith@console.com	Notes:
Address:	Emergency Contact:
Birthday:	Contact Relationship:
Transaction to Employee Ratio: 20	Emergency Phone:

[Edit Additional Information ▶▶](#)

Edit Employee: Aaron Smith

Employee Information **Additional Information** Site Access

Phone:	Employee #
Mobile Phone:	123456
555-555-5555	Birthday:
Mobile Service Provider:	Start Date:
AT&T	Pay Type: <input type="radio"/> Hourly <input checked="" type="radio"/> Salary
Email Address:	Yearly Salary:
asmith@console.com	35000
Street Address:	Effective Date:
Street Address Line 2:	1/1/2016
City:	Transaction to Employee Ratio:
State:	20
Zip:	Notes:
	Emergency Contact:
	Contact Relationship:
	Emergency Phone:

[Save](#) [Cancel](#)

Related Topics:

[Adding New Users to the System](#)

[Inactivate an Employee](#)

[Delete an Employee](#)

[Managing Existing Users](#)

[Creating a new Department, Position or Task](#): How to create a new Department, Position or Task.

[Importing Employee Information via the Unrecognized Clock-In Alert](#)

[Adding Employee Notes](#)

[Roles & Responsibilities](#)

[Adjusting or Setting User Permissions](#)

Roles & Responsibilities

In this module, you will learn:

- How to create new Departments, Positions and Tasks within the Roles management platform
- How to create new Departments, Positions and Tasks within an employee record
- How to edit Department, Positions and Tasks

*Creating New Departments, Positions and Tasks

To create a new user you will need to navigate to the **Labor Management** module and click **Roles**.

The screenshot displays the NCR Silver dashboard for a store named "PTC Concierge Support". The top navigation bar includes "Dashboard", "Store", "Reports", and "Resources". A dropdown menu under "Store" is open, showing options: "Day-to-Day", "Labor", "Planning", and "Product". The "Labor" option is highlighted with a green box. A green arrow points from this box down to the "Roles" option in the "Labor Management" section of the dashboard. The "Labor Management" section contains four tiles: "Employees", "Work Schedule", "Time Card", and "Employee Availability". The "Roles" tile is highlighted with a green box and contains the text: "Assign your crew members to various department and roles to help you organize your team".

Dashboard

Store: **PTC Concierge Support**

Alerts

Message	Date
Unavailability Received	3/29/2016

View All

Current

Sales By Day

Today Prev Week Prev Year

Monthly Progress

Filter by Store: All Stores [Change]

Labor Management

Employees
Manage your employee information and their preferences, including scheduling preferences

Work Schedule
Manage your staff's schedule. Try using the Auto Schedule feature.

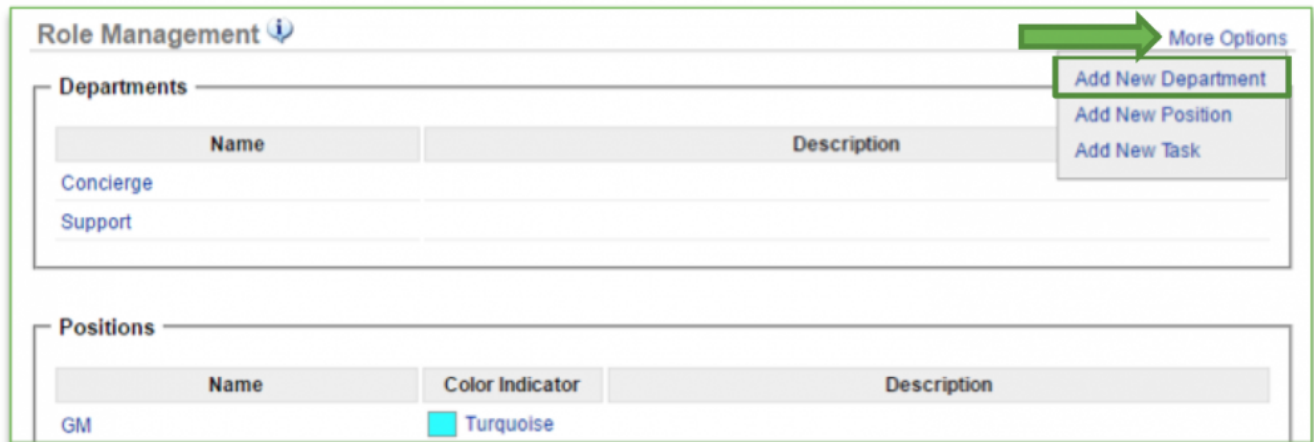
Time Card
Enter and manage the hours your employee clock-in for their shift

Employee Availability
Set and track your employees' schedule availability

Roles
Assign your crew members to various department and roles to help you organize your team

1. Click **More Options**

2. Click **Add New Department**



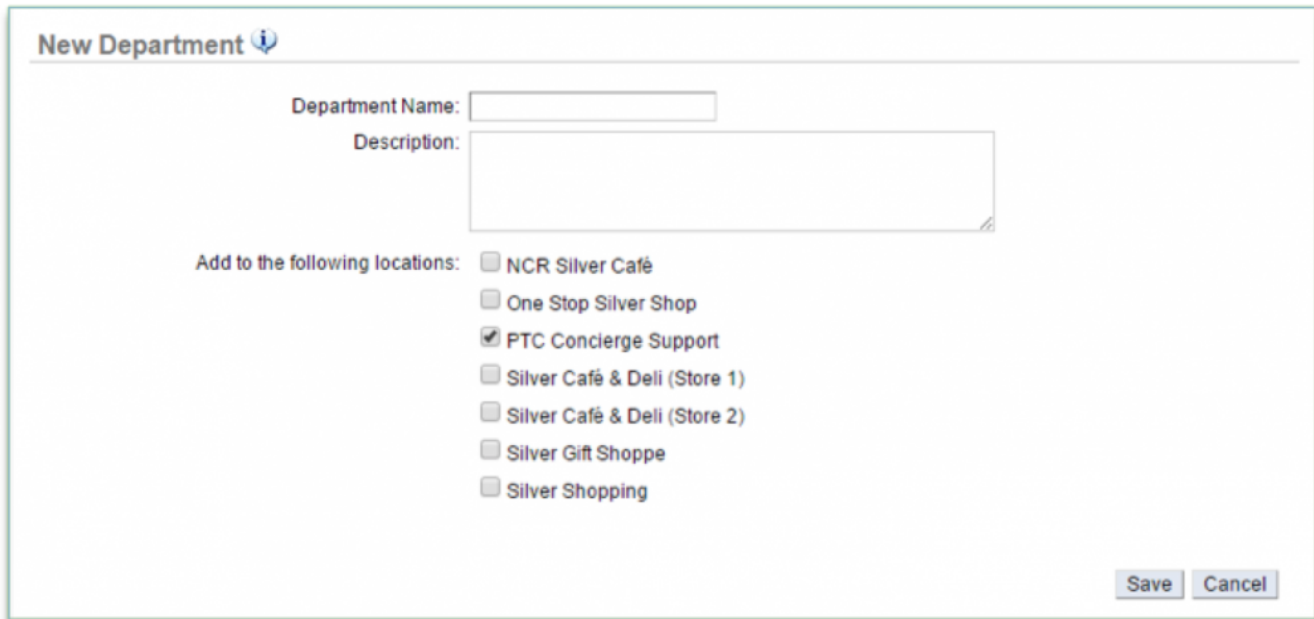
The screenshot shows the 'Role Management' interface. At the top right, there is a 'More Options' link with a green arrow pointing to it. A dropdown menu is open, showing three options: 'Add New Department' (highlighted with a green box), 'Add New Position', and 'Add New Task'. Below the menu, there are two sections: 'Departments' and 'Positions'. The 'Departments' section has a table with columns 'Name' and 'Description', containing 'Concierge' and 'Support'. The 'Positions' section has a table with columns 'Name', 'Color Indicator', and 'Description', containing 'GM' with a 'Turquoise' color indicator.

3. Enter the **Department Name**

4. Enter a **Description** (*optional*)

5. Select all locations that this department should be applied to

6. Click **Save**



The screenshot shows the 'New Department' form. It has a title bar 'New Department' with an information icon. Below the title bar, there are two input fields: 'Department Name:' and 'Description:'. Below these fields, there is a section titled 'Add to the following locations:' with a list of checkboxes. The checkboxes are: 'NCR Silver Café', 'One Stop Silver Shop', 'PTC Concierge Support' (checked), 'Silver Café & Deli (Store 1)', 'Silver Café & Deli (Store 2)', 'Silver Gift Shoppe', and 'Silver Shopping'. At the bottom right, there are two buttons: 'Save' and 'Cancel'.

To Create a New Position

1. Click **More Options**

2. Click **Add New Position**

The screenshot shows the 'Role Management' interface. At the top right, there is a 'More Options' link with a green arrow pointing to it. Below this, a dropdown menu is open, showing three options: 'Add New Department', 'Add New Position' (which is highlighted with a green box), and 'Add New Task'. The main content area is divided into two sections: 'Departments' and 'Positions'. The 'Departments' section has a table with columns 'Name' and 'Description', listing 'Concierge' and 'Support'. The 'Positions' section has a table with columns 'Name', 'Color Indicator', and 'Description', listing 'GM' with a 'Turquoise' color indicator.

3. Enter the **Position Name**

4. Enter a **Description** (*optional*)

5. Select the **Color Indicator** (*optional*). You can choose to display this color within the work schedule

6. Select all locations that this position should be applied to

7. Click **Save**

The screenshot shows the 'New Position' form. It has a title bar with 'New Position' and an information icon. The form contains the following fields and options:

- Position Name (Required):** A text input field.
- Description:** A larger text input field.
- Color Indicator:** A dropdown menu labeled 'Select Color' and a small square color selection box.
- Add to the following locations:** A list of checkboxes for various locations:
 - ☐ NCR Silver Café
 - ☐ One Stop Silver Shop
 - ☒ PTC Concierge Support
 - ☐ Silver Café & Deli (Store 1)
 - ☐ Silver Café & Deli (Store 2)
 - ☐ Silver Gift Shoppe
 - ☐ Silver Shopping
- Buttons:** 'Save' and 'Cancel' buttons at the bottom right.

To Create a New Task

1. Click **More Options**

2. Click **Add New Task**

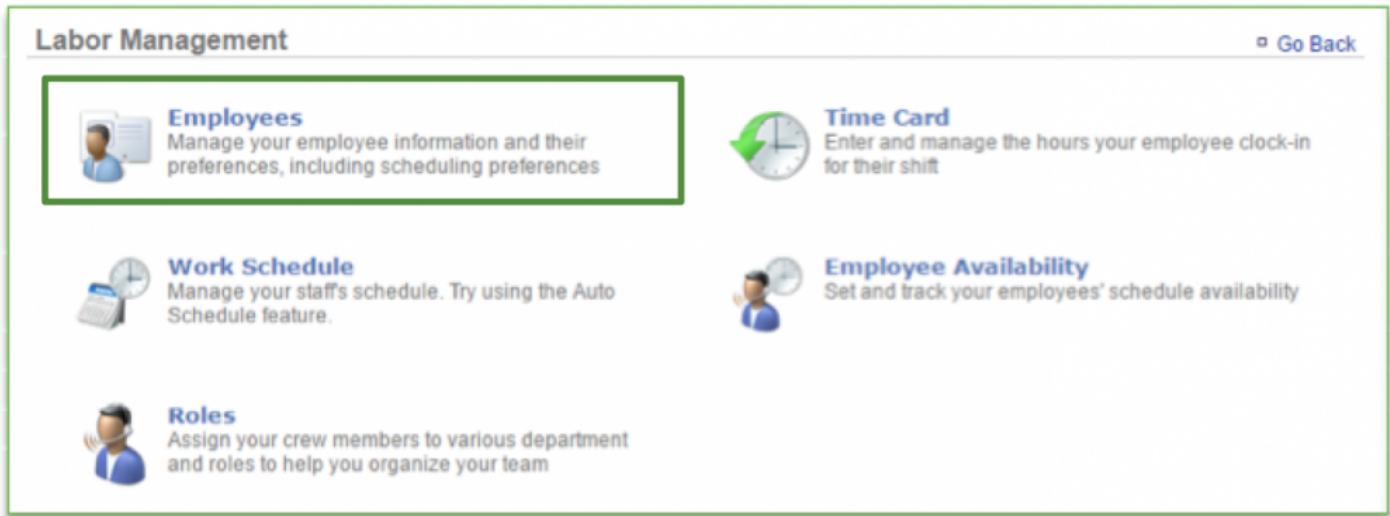
The screenshot shows the 'Role Management' interface. At the top right, there is a 'More Options' link with a green arrow pointing to a dropdown menu. The dropdown menu contains three options: 'Add New Department', 'Add New Position', and 'Add New Task'. The 'Add New Task' option is highlighted with a green border. Below the dropdown, there are two sections: 'Departments' and 'Positions'. The 'Departments' section has a table with columns 'Name' and 'Description', listing 'Concierge' and 'Support'. The 'Positions' section has a table with columns 'Name', 'Color Indicator', and 'Description', listing 'GM' with a 'Turquoise' color indicator.

3. Enter the **Task Name**
4. Enter a **Description** (*optional*)
5. Select all locations that this task should be applied to
6. Click **Save**

The screenshot shows the 'New Task' form. It has a 'Task Name' field and a 'Description' field. Below these fields, there is a section titled 'Add to the following locations:' with a list of checkboxes. The locations are: 'NCR Silver Café', 'One Stop Silver Shop', 'PTC Concierge Support' (which is checked), 'Silver Café & Deli (Store 1)', 'Silver Café & Deli (Store 2)', 'Silver Gift Shoppe', and 'Silver Shopping'. At the bottom right, there are 'Save' and 'Cancel' buttons.

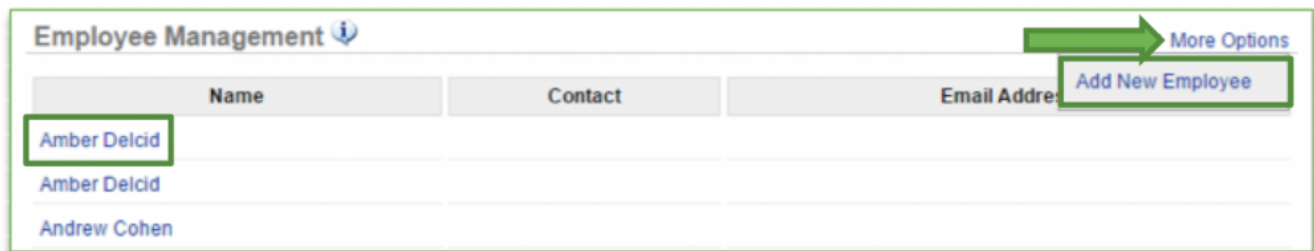
Creating New Departments, Positions and Tasks Within an Employee Record

To create a new user within an employee record you will need to navigate to the **Labor Management** module and click **Employees**.

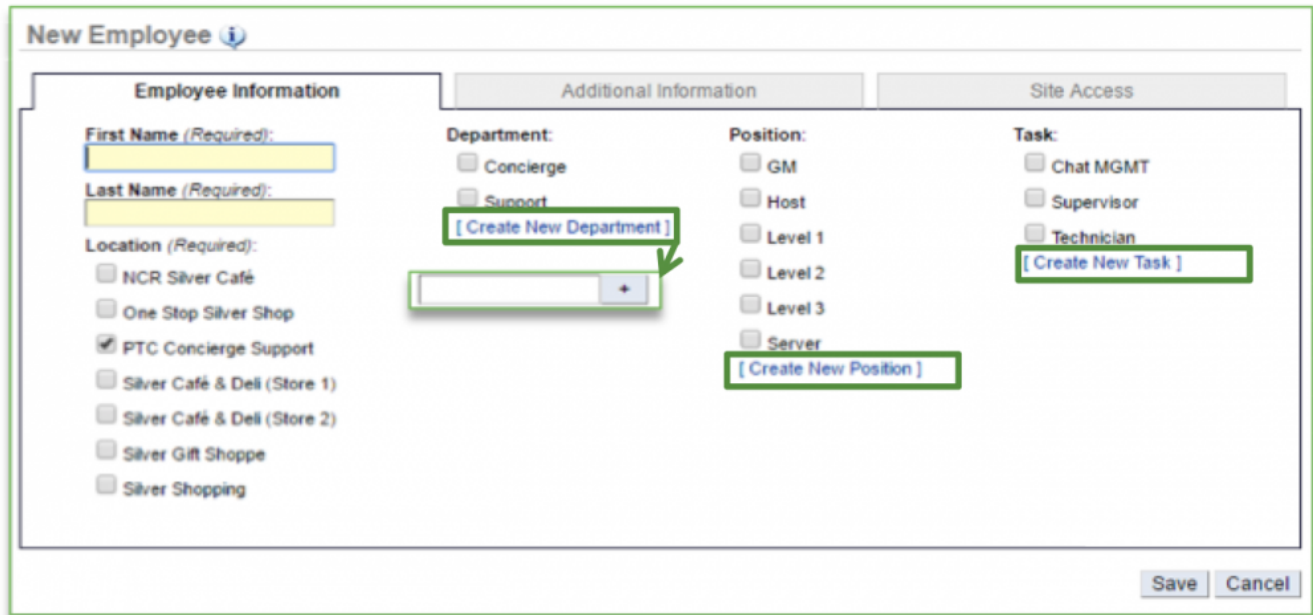


To Create Departments, Positions and Tasks Within an Employee Record

1. Select any employee already created, or click **More Options** and **Add New Employee**



2. Click the Create New Department, Create New Position, or Create New Task links below each category
 - a. This will open a field that allows you to enter text
3. Enter your text and click the + symbol

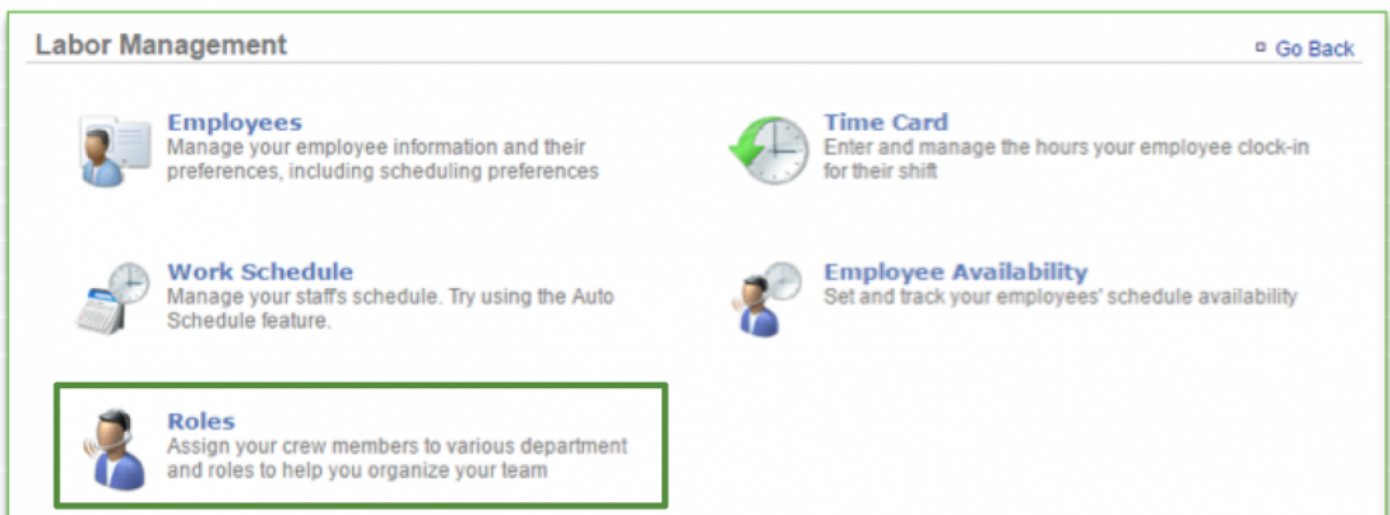
4. Click **Save**


The screenshot shows the 'New Employee' form with three tabs: 'Employee Information', 'Additional Information', and 'Site Access'. The 'Employee Information' tab is active. It contains fields for 'First Name (Required)', 'Last Name (Required)', and 'Location (Required)'. The 'Location' section has a list of checkboxes for various locations, with 'PTC Concierge Support' selected. To the right of the 'Location' list is a 'Department' section with checkboxes for 'Concierge' and 'Support', and a '[Create New Department]' button. Below the 'Department' section is a text input field with a '+' button. To the right of the 'Department' section is a 'Position' section with checkboxes for 'GM', 'Host', 'Level 1', 'Level 2', 'Level 3', and 'Server', and a '[Create New Position]' button. To the right of the 'Position' section is a 'Task' section with checkboxes for 'Chat MGMT', 'Supervisor', and 'Technician', and a '[Create New Task]' button. At the bottom right of the form are 'Save' and 'Cancel' buttons. Green boxes and arrows highlight the '[Create New Department]', '[Create New Position]', and '[Create New Task]' buttons.

Once you have created departments, positions and tasks, you will have the ability to assign them to your employee(s) by checking the box to the left of the created items. Employees may be assigned to multiple departments, positions and tasks.

Editing Departments, Positions and Tasks

To edit a new user you will need to navigate to the **Labor Management** module and click **Roles**.

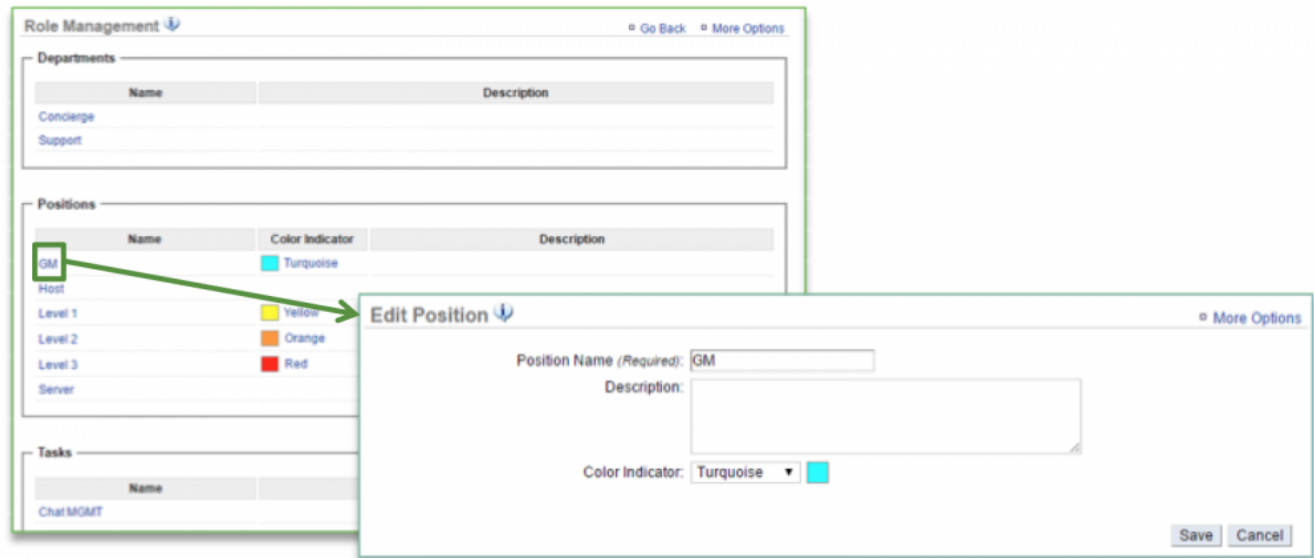


The screenshot shows the 'Labor Management' module with a 'Go Back' link in the top right corner. The module contains five main sections, each with an icon and a description: 'Employees' (Manage your employee information and their preferences, including scheduling preferences), 'Time Card' (Enter and manage the hours your employee clock-in for their shift), 'Work Schedule' (Manage your staff's schedule. Try using the Auto Schedule feature.), 'Employee Availability' (Set and track your employees' schedule availability), and 'Roles' (Assign your crew members to various department and roles to help you organize your team). The 'Roles' section is highlighted with a green box.

Editing Existing Departments, Positions and Tasks

To edit a department, position or task within an employee record:

1. Click any department, position or task already created
2. Make your edits and click **Save**



Related Topics:

[Adding New Users to the System](#)

[Inactivate an Employee](#)

[Delete an Employee](#)

[Managing Existing Users](#)

[Creating a new Department, Position or Task](#): How to create a new Department, Position or Task.

[Importing Employee Information via the Unrecognized Clock-In Alert](#)

[Adding Employee Notes](#)

[Adding Additional Employee Information](#)

[Adjusting or Setting User Permissions](#)

User Permissions

In this module, you will learn:

- How to assign user permissions to an employee
 - Store Management and Employee Portal access
- How to modify user permissions for an employee

Assigning User Permissions

To assign user permissions to an employee you will need to navigate to the **Labor Management** module and click **Employees**.

The screenshot shows the NCR Silver dashboard for 'Store: PTC Concierge Support'. The top navigation bar includes 'Dashboard', 'Store', 'Reports', and 'Resources'. A dropdown menu under 'Store' is open, showing 'Day-to-Day', 'Labor', 'Planning', and 'Product'. A green box highlights the 'Labor' option, and a green arrow points from it to the 'Employees' option in the 'Labor Management' section below. The 'Labor Management' section contains several options: 'Employees' (highlighted with a green box), 'Time Card', 'Work Schedule', 'Employee Availability', and 'Roles'. The 'Employees' option is described as 'Manage your employee information and their preferences, including scheduling preferences'.

Site Access

1. Select the employee for which you wish to assign user permissions

The screenshot shows the 'Employee Management' interface. It features a table with columns for 'Name', 'Contact', and 'Email Address'. The 'Name' column contains two entries: 'Aaron Smith' and 'Amber Delcid'. A green box highlights the 'Aaron Smith' entry, indicating it is the selected employee for assigning user permissions.

2. Click **Edit Employee Information**

Employee: Aaron Smith Go Back More Options

Employee Information

Name: Aaron Smith Department:

Location: PTC Concierge Support Position:

Task:

[Edit Employee Information >>](#)

Notes on this Employee

Date	Note	Type
New Note		

[View All for this Employee >>](#)

Additional Information [Show](#)

3. Click the **Site Access** tab

Edit Employee: Aaron Smith

Employee Information **Additional Information** **Site Access**

First Name (Required):
Aaron

Last Name (Required):
Smith

Status:
Active ▼

Location (Required):

☐ NCR Silver Café

☐ One Stop Silver Shop

☒ PTC Concierge Support

☐ Silver Café & Deli (Store 1)

☐ Silver Café & Deli (Store 2)

☐ Silver Gift Shoppe

☐ Silver Shopping

Department:

☐ Concierge

☐ Support

[\[Create New Department \]](#)

Position:

☐ GM

☐ Host

☐ Level 1

☐ Level 2

☐ Level 3

☐ Server

[\[Create New Position \]](#)

Task:

☐ Chat MGMT

☐ Supervisor

☐ Technician

[\[Create New Task \]](#)

[Save](#) [Cancel](#)

4. You have the option to assign **Store Management** access and/or **Employee Site** access
- Store management access gives the user access to <https://store.ncrconsole.com>

- i. You will have the ability to restrict permissions to adjust what they see under their login
- b. Employee site access gives the employee access to the employee portal which provides the following to any user with access to it
 - i. Time card information, work schedule, availability portal and training materials (if applicable)
- c. Users can be assigned to the Store Management **and** Employee Site

Edit Employee: Aaron Smith

Employee Information Additional Information **Site Access**

☐ Give access to the Store Management site
☐ Give access to the Employee site (employee.cimplebox.com)

Save Cancel

Assigning Access to Store Management

1. Click the **Give access to the Store Management site** option
2. Enter a Username under **Login Credentials** and click **Change Password**

Edit Employee: Aaron Smith

Employee Information Additional Information **Site Access**

☒ Give access to the Store Management site
☐ Give access to the Employee site (employee.cimplebox.com)

Login Credentials

Username (Minimum 6 characters) :

Password:
 ***** [Change Password]

Store Management Site Access Details

Default to this location at log in: PTC Concierge Support ▼

Access: Admin - Access to all areas ▼

Save Cancel

3. Enter password
4. Reenter password to confirm

5. Click the dropdown arrow to the right of **Default to this location at login** (if applicable) to select the location to which the employee (user) is assigned
6. Click the dropdown arrow to the right of **Access**
 - a. *Admin* – Provides the user to all areas of the store management site and for all locations
 - b. *Limited* – Provides the user to only those areas of the store management site that you assign them to and to the stores they are assigned to

Edit Employee: Aaron Smith

Employee Information Additional Information **Site Access**

☒ Give access to the Store Management site
☐ Give access to the Employee site (employee.cimpletebox.com)

Login Credentials

Username (Minimum 6 characters) :
Password (6 - 12 characters) :
Confirm Password:

Store Management Site Access Details

Default to this location at log in: PTC Concierge Support ▼

Access: Admin - Access to all areas ▼
Admin - Access to all areas
Limited - Select rights below

Save Cancel

- i. If you selected Limited, the window will expand to include additional selection options

Store Management Site Access Details

Default to this location at log in: PTC Concierge Support

Access: Limited - Select rights below

Store	Reports	Resources	Administration
<input type="checkbox"/> Day-to-Day	<input type="checkbox"/> Sales Reports	<input type="checkbox"/> Documents	<input type="checkbox"/> Store Settings
<input type="checkbox"/> Disable Edit Sales	<input type="checkbox"/> Sales		<input type="checkbox"/> General Settings
<input type="checkbox"/> Labor	<input type="checkbox"/> Product Mix		<input type="checkbox"/> Integration
<input type="checkbox"/> Employees	<input type="checkbox"/> Modifier Report		<input type="checkbox"/> POS Integration
<input type="checkbox"/> Time Card	<input type="checkbox"/> Item Sales By Employee		<input type="checkbox"/> Payroll Integration
<input type="checkbox"/> Hide Pay Rates	<input type="checkbox"/> Daily Summary		<input type="checkbox"/> Custom Data
<input type="checkbox"/> Work Schedule	<input type="checkbox"/> Labor		
<input type="checkbox"/> Employee Availability	<input type="checkbox"/> Labor Costs		
<input type="checkbox"/> Roles	<input type="checkbox"/> Pay Period Report		
<input type="checkbox"/> Planning	<input type="checkbox"/> Employee History		
<input type="checkbox"/> Sales Target	<input type="checkbox"/> Time Card Discrepancy		
<input type="checkbox"/> Labor Target	<input type="checkbox"/> Inventory		
<input type="checkbox"/> Product	<input type="checkbox"/> Inventory History		
<input type="checkbox"/> Inventory	<input type="checkbox"/> Inventory Movement		
<input type="checkbox"/> Add Inventory	<input type="checkbox"/> Discrepancy Report		
<input type="checkbox"/> Take Inventory	<input type="checkbox"/> Spending Report		
<input type="checkbox"/> Inventory Tools	<input type="checkbox"/> Cost of Goods Sold		
<input type="checkbox"/> Download Products	<input type="checkbox"/> Inventory On Hand		
<input type="checkbox"/> Raw Ingredient Wizard	<input type="checkbox"/> Survey		
<input type="checkbox"/> Manage Inventory	<input type="checkbox"/> Other Data		
	<input type="checkbox"/> Key Indicators		
	<input type="checkbox"/> Other Reports		

Save Cancel

7. Click **Save**

- Send the user their login credentials and the applicable URL (<https://store.ncrconsole.com>)
- If you have provided the user with access to both sites, they can use the same login credentials

IMPORTANT: If you give a user **Admin** rights to the Store Management site, they will automatically see all information, and for all stores within your network. If you do not want a user to have full admin rights, you must assign them **Limited** access and then select only those items you want them to see.

It is also important that you assign the user to only those locations you wish them to have access to.

If at any time you change a user's permissions *from* an admin to a user with limited rights, you must go back to their employee record to uncheck any additional locations that were previously checked.

Assigning Access to Employee Site

- Click the **Give access to the Employee site** option

2. Enter a Username under **Login Credentials**
3. Enter password
4. Reenter password to confirm
5. Click **Save**
 - a. Send the user their login credentials and the applicable URL (<https://employee.ncrconsole.com>)
 - b. If you have provided the user with access to both sites, they can use the same login credentials

Edit Employee: Aaron Smith

Employee Information Additional Information **Site Access**

☐ Give access to the Store Management site

☒ Give access to the Employee site (employee.cimplebox.com)

Login Credentials

Username (Minimum 6 characters) :

Password (6 - 12 characters) :

Confirm Password:

Save Cancel

Related Topics:

[Adding New Users to the System](#)

[Inactivate an Employee](#)

[Delete an Employee](#)

[Managing Existing Users](#)

[Creating a new Department, Position or Task](#): How to create a new Department, Position or Task.

[Importing Employee Information via the Unrecognized Clock-In Alert](#)

[Adding Employee Notes](#)

[Adding Additional Employee Information](#)

[Roles & Responsibilities](#)

Employee Availability

This section illustrates how an employee will request time off and how a manager will process those requests. Click on a topic below for more detailed information.

[Requesting Time Off](#)

[Managing Time Off Requests](#)

Request Time Off

In this module, you will learn:

- How to request time off

Resting Time Off

Employees can request time off at any time via the Employee portal (<https://employee.ncrconsole.com>). To request time off the employee will need to click the **Schedule** tab and then **Availability**.

The screenshot displays the NCR Employee Portal interface. At the top, there are logos for NCR and SILVER. A green arrow points from the 'Schedule' tab in the top navigation bar to the 'Availability' option in the 'Schedule' section below. The 'Employee Portal' header includes a welcome message for Aaron and links for Settings and Log Out. The main content area is divided into several sections: 'Alert' with a message about a shift cover request dated 8/7/2016; 'Upcoming Schedule' with a 'View full schedule' link; 'Contact' with a 'Contact Manager' link; and 'Time Card' showing a table of weekly hours.

Week Of	Total Hours
7/31/2016	0.00
8/7/2016	0.00

The 'Schedule' section at the bottom contains two options: 'Work Schedule' (View my work schedule) and 'Availability' (Submit my availability schedule for approval). The 'Availability' option is highlighted with a green box and a green arrow pointing to it from the 'Schedule' tab in the top navigation bar.

To Submit a Request

1. Select the week that your time off request applies to

- a. Once time off has been submitted, it cannot be retracted or edited

Availability Go Back	
NCR Silver Café	
Week	Status
8/1/2016 - 8/7/2016	Not Submitted
8/8/2016 - 8/14/2016	Not Submitted
8/15/2016 - 8/21/2016	Not Submitted
8/22/2016 - 8/28/2016	Not Submitted
8/29/2016 - 9/4/2016	Not Submitted
9/5/2016 - 9/11/2016	Not Submitted
9/12/2016 - 9/18/2016	Not Submitted
9/19/2016 - 9/25/2016	Not Submitted

- Select **Click to edit** for the day you want to submit a time off request for
 - If there are other days during the week that you need to request time off for, you must submit them all at one time as you will not be able to modify requests for this week once submitted
- Click the dropdown arrow to the right of **Availability** and select **Not Available**

Availability: NCR Silver Café Go Back

8/29/2016 - 9/4/2016

8/29 Mon	8/30 Tue	8/31 Wed	9/1 Thu	9/2 Fri	9/3 Sat	9/4 Sun
Click to edit	Click to edit			Click to edit	Click to edit	Click to edit

Aaron Smith
Saturday, 9/3/2016

Availability: Available ▼

Available
Not Available

Save Cancel

Status: Not Submitted

Submit for Approval Go Back

- Select **All day** or **Specific times**
 - If you select specific times the window will expand for additional input

5. Click **Save**

Aaron Smith
Saturday, 9/3/2016

Availability: Not Available ▾

☐ All day

☒ Specific times

9:00am

▼

To

2:00pm

▼

▼

To

▼

▼

To

▼

Save

Cancel

6. Click **Submit for Approval**

Availability: *NCR Silver Café*

[Go Back](#)

8/29/2016 - 9/4/2016

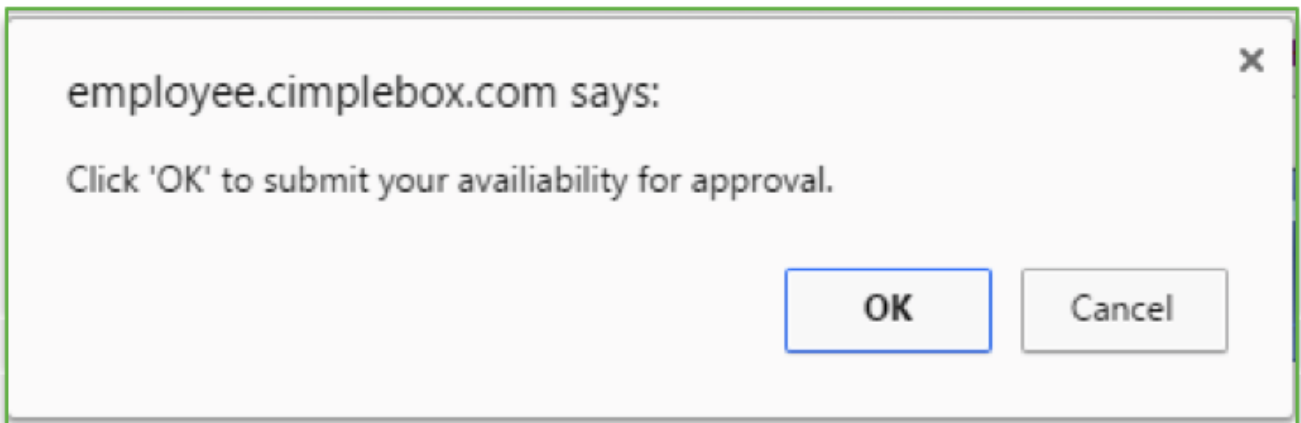
8/29 Mon	8/30 Tue	8/31 Wed	9/1 Thu	9/2 Fri	9/3 Sat	9/4 Sun
Click to edit	Click to edit	Click to edit	Click to edit	Click to edit	9am - 2pm	Click to edit

Status: **Not Submitted**

Submit for Approval

Go Back

7. You will be asked to confirm your submission. Click **OK**



You will see your submission reflected in the Availability portal with a status of **Pending Approval**. If approved, the status will change to **Approved** and will be reflected in the store management work schedule.

Availability Go Back	
NCR Silver Café	
Week	Status
8/1/2016 - 8/7/2016	Not Submitted
8/8/2016 - 8/14/2016	Not Submitted
8/15/2016 - 8/21/2016	Not Submitted
8/22/2016 - 8/28/2016	Not Submitted
8/29/2016 - 9/4/2016	Pending Approval
9/5/2016 - 9/11/2016	Not Submitted
9/12/2016 - 9/18/2016	Not Submitted
9/19/2016 - 9/25/2016	Not Submitted

Related Topics:

[Managing Time Off Requests](#)

Managing Requests

The purpose of this section is to illustrate how a Manager manages time off requests.

How to Give an Employee Access to Request Time Off

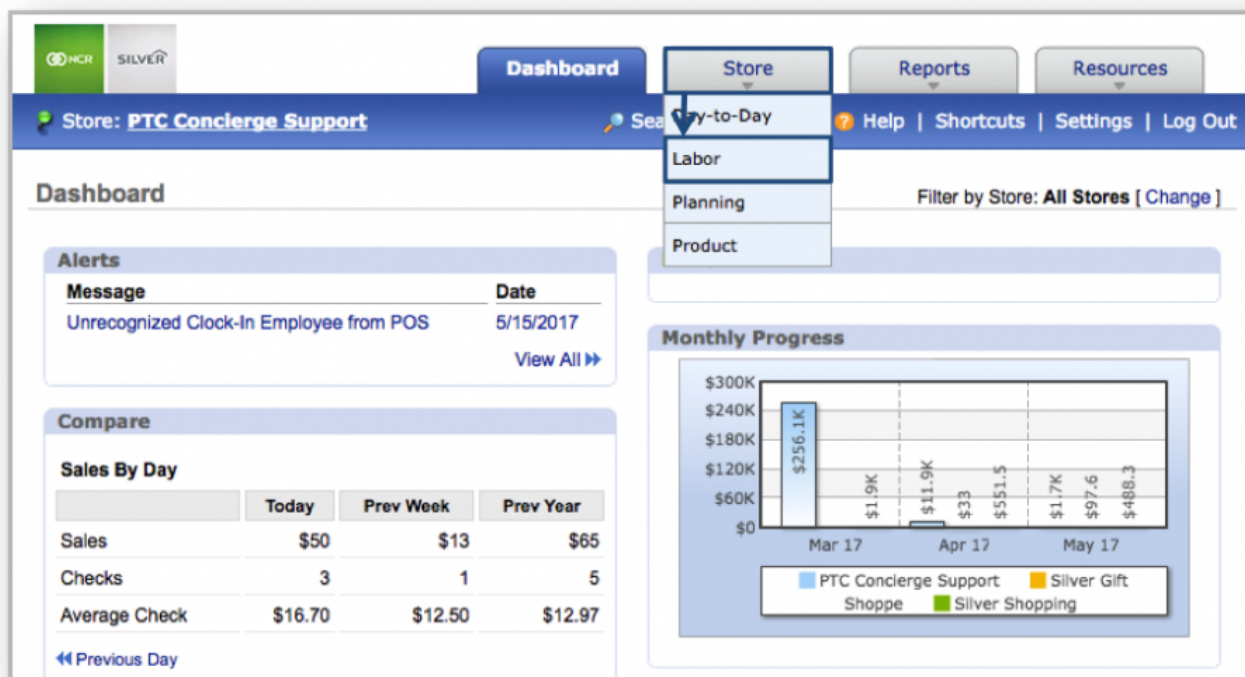
To request time off, employees must first have access to the *Employee* site on CimpleBox (see Step 5 of [Permission Setting](#)).

Managing Time Off Requests

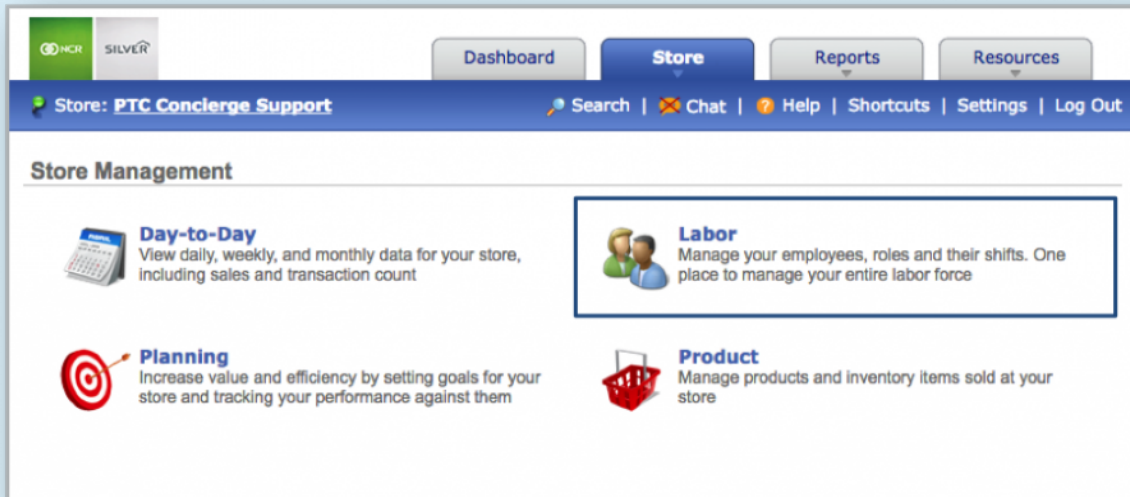


Click to see it in action

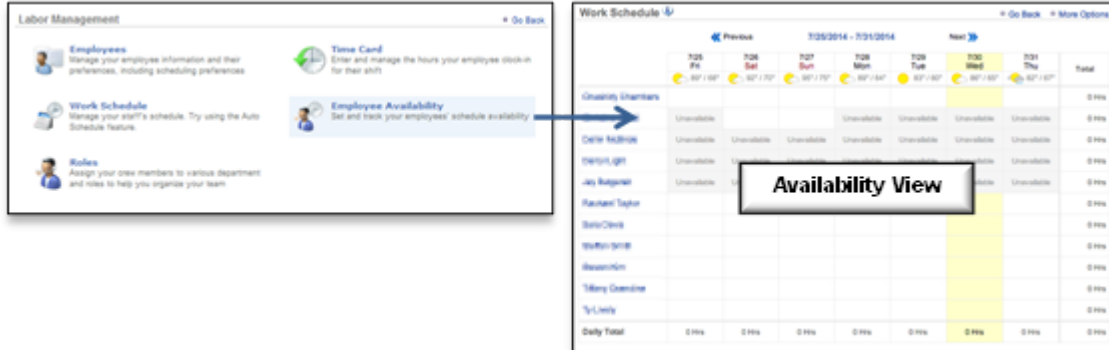
STEP 1: From your Dashboard view, mouse over the **Store** tab and click **Labor**.



* **Hint:** You can also access Labor by clicking on the **Store** tab and then on **Labor** from the Store Management screen.

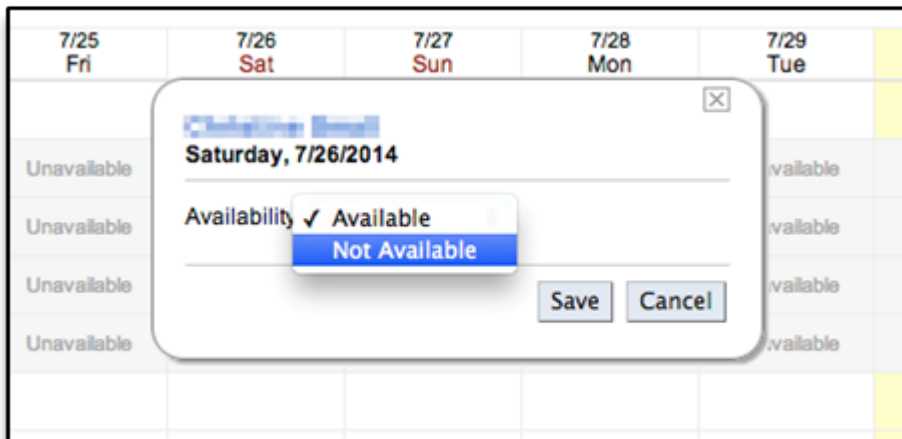


STEP 2: Click on **Employee Availability** to bring up the weekly schedule view.

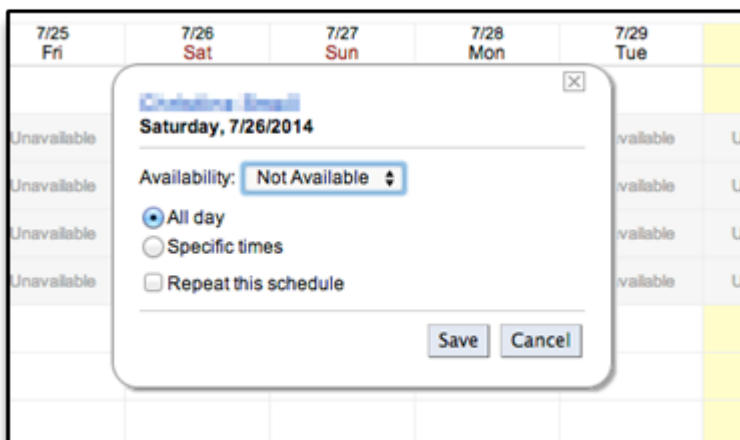


* Click the **<< Previous** and **Next >>** links at the top of the page to move from one week to another.

STEP 3: Mouse over to, and click on, the day you wish to adjust availability for.



STEP 4: Select **Available** or **Not Available**. You can choose to enter specific times or click **"All Day"**. Click **Save** when done.



* **Note:** Managers will see, and have the ability to adjust, availability for all employees.

To view employee unavailability, click **View Unavailable Times** in the lower right corner.

The screenshot shows the 'Employee Availability' page for 'Store: BR - Mission Grove'. The date range is '2/28/2011 - 3/6/2011'. The table below shows availability for four employees: Sarah Johnson, Tyrell Jones, Bernadette Orsini, and Christine Harrison. The column for Wednesday, 3/2, is highlighted in yellow, indicating unavailability for all listed employees. The 'View Unavailable Times' button is selected and highlighted with a red box.

	2/28 Mon	3/1 Tue	3/2 Wed	3/3 Thu	3/4 Fri	3/5 Sat	3/6 Sun
Sarah Johnson							
Tyrell Jones							
Bernadette Orsini							
Christine Harrison							

View Unavailable Times View Available Times

To view employee availability, click **View Available Times** in the lower right corner.

The screenshot shows the 'Employee Availability' page for 'Store: BR - Mission Grove'. The date range is '2/28/2011 - 3/6/2011'. The table below shows availability for four employees: Sarah Johnson, Tyrell Jones, Bernadette Orsini, and Christine Harrison. The column for Wednesday, 3/2, is highlighted in yellow, indicating availability for all listed employees. The 'View Available Times' button is selected and highlighted with a red box.

	2/28 Mon	3/1 Tue	3/2 Wed	3/3 Thu	3/4 Fri	3/5 Sat	3/6 Sun
Sarah Johnson	All Day	All Day	All Day	All Day	All Day	All Day	All Day
Tyrell Jones	All Day	All Day	All Day	All Day	All Day	All Day	All Day
Bernadette Orsini	All Day	All Day	All Day	All Day	All Day	All Day	All Day
Christine Harrison	All Day	All Day	All Day	All Day	All Day	All Day	All Day

View Unavailable Times View Available Times

How to Approve Time Off Requests

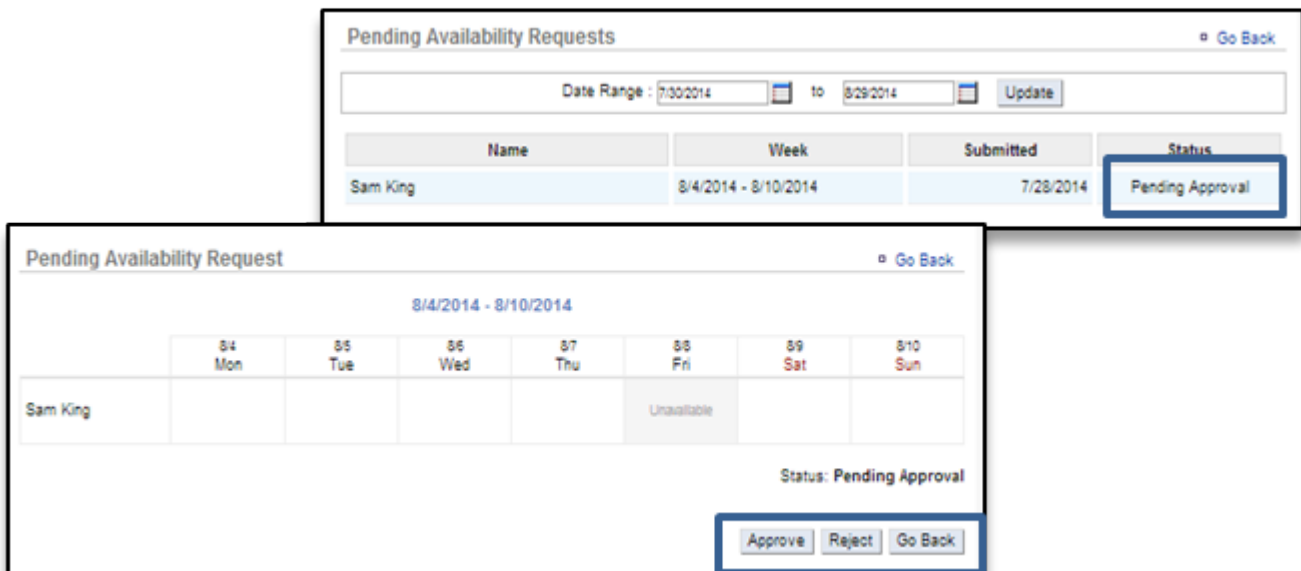


Click to see it in action

STEP 1: Your employee can submit unavailability (or time off requests) via their own log ins through the *Employee* site. An alert will show up in the *Alerts* box of your Dashboard when they do this. Click on ***Unavailability Received*** to open the message. Click the link within the message to go to the request.



STEP 2: From here, click the ***Pending Approval*** status link to approve or reject the request.



Note: Accepted requests will be automatically reflected on the weekly schedule.

Related Topics:

[Requesting Time Off](#)

Create a Work Schedule

In this module, you will learn:

- How to create a work schedule within Console

Creating a Work Schedule

To create a work schedule you will need to navigate to the **Labor Management** module and click **Work Schedule**.

The screenshot shows the NCR Silver dashboard for a store named 'PTC Concierge Support'. The top navigation bar includes 'Dashboard', 'Store', 'Reports', and 'Resources'. The 'Store' dropdown menu is open, showing options: 'Day-to-Day', 'Labor', 'Planning', and 'Product'. The 'Labor' option is highlighted with a green box. A green arrow points from this box to the 'Work Schedule' option in the 'Labor Management' section below. The 'Labor Management' section includes options for 'Employees', 'Time Card', 'Work Schedule', and 'Employee Availability'. The 'Work Schedule' option is also highlighted with a green box. The dashboard also features an 'Alerts' section with a message about unavailability received on 3/29/2016, and a 'Monthly Progress' bar chart showing sales for May, June, and July 2016.

Month	Sales
May 16	\$45.8K
Jun 16	\$52.8K
Jul 16	\$1.7K

The **Work Schedule** view defaults to the current week and with any set unavailability showing. If partial unavailability has already been set, you will see it in red when you click on the applicable day.

You will have three options for building a schedule:

- Manual entry (required for the first schedule)
- Copy Previous Week's Schedule
- Auto Schedule the Week (requires at least four previously scheduled consecutive weeks)

Work Schedule
[Go Back](#)
[More Options](#)

[Previous](#)
8/22/2016 - 8/28/2016
[Next](#)

	8/22 Mon	8/23 Tue	8/24 Wed	8/25 Thu	8/26 Fri	8/27 Sat	8/28 Sun	Total
Employee 1 (Shift Supervisor)	9am - 12pm 1 - 6pm		3 - 10pm	Unavailable	7am - 1pm	4 - 10pm	7am - 1pm	33 Hrs \$429.00
Employee 2 (Manager)		9am - 1pm 2 - 6pm	9am - 1pm	9am - 10pm	11am - 4pm	9am - 5pm	8am - 2pm	44 Hrs \$880.00
Employee 3 (Team Member)	5 - 8pm	Unavailable		9am - 3pm	1 - 5:15pm	6:30 - 10pm	2 - 11pm	25:45 Hrs \$257.50
Employee 4 (Team Member)	4 - 10pm	4 - 10pm			9am - 10pm		9am - 2pm	30 Hrs \$360.00
Employee 5 (Team Member)		2 - 9pm	9am - 2:45pm	3 - 8pm	Unavailable	9am - 1pm		21:45 Hrs \$206.63
Employee 6 (Team Lead)	9am - 2:30pm	11am - 2pm			1 - 5pm 6 - 10pm	10am - 3pm	2 - 10pm	29:30 Hrs \$295.00
Daily Total	22:30 Hrs \$261.00	24 Hrs \$328.50	16:45 Hrs \$225.63	24 Hrs \$367.50	36:15 Hrs \$456.50	26:30 Hrs \$361.00	34 Hrs \$428.00	184 Hrs

[Auto Schedule this Week](#)
[Clear this Week's Schedule](#)
[Copy Previous Week's Schedule](#)
[Add Note for this Week](#)

Total Labor Cost: \$2,428.13
 Estimated Labor Percentage:

Manually Creating a Schedule

1. Toggle to the week you want to set the schedule for by clicking **Previous** or **Next** at the top of the page near the date range
2. Click the cell under the day and to the right of the employee that you want to add a shift for
3. Click the dropdown arrows to select the start and end times of the shift
4. Click **Save**

5. Repeat steps 2 and 3 for each employee and for each day they are to be scheduled

Work Schedule ⓘ Go Back More Options

Previous **8/29/2016 - 9/4/2016** Next

	8/29 Mon	8/30 Tue	8/31 Wed	9/1 Thu	9/2 Fri	9/3 Sat	9/4 Sun	Total
Employee 1 (Shift Supervisor)				Unavailable				0 Hrs \$0.00
Employee 2 (Manager)								0 Hrs \$0.00
Employee 3 (Team Member)								0 Hrs \$0.00
Employee 4 (Team Member)								0 Hrs \$0.00
Employee 5 (Team Member)					Unavailable			0 Hrs \$0.00
Employee 6 (Team Lead)								0 Hrs \$0.00
Daily Total	0 Hrs \$0.00	0 Hrs \$0.00	0 Hrs \$0.00	0 Hrs \$0.00	0 Hrs \$0.00	0 Hrs \$0.00	0 Hrs \$0.00	0 Hrs

☐ Auto Schedule this Week
☐ Clear this Week's Schedule
☐ Copy Previous Week's Schedule
☐ Add Note for this Week

Total Labor Cost: \$0.00
 Estimated Labor Percentage: 0.0% based on past 30 days ▼

- a. You can edit or add a shift to any shift already created by selecting the shift clicking **Edit** or **Add Shift**

Work Schedule ⓘ

Previous **8/29/2016 - 9/4/2016**

	8/29 Mon	8/30 Tue	8/31 Wed	9/1 Thu
Employee 1 (Shift Supervisor)	6am - 2:45pm			Unavailable
Employee 2 (Manager)				
Employee 3 (Team Member)				
Employee 4 (Team Member)				


Employee 1
Monday, 8/29

6am - 2:45pm [Edit]

Remove Add Shift

Copying the Prior Week's Schedule

1. Toggle to the week you want to set the schedule for by clicking **Previous** or **Next** at the top of the page near the date range
2. Click the **Copy Previous Week's Schedule** link at the bottom left corner of the page
3. Select those employees you wish to copy the schedule for
4. Click **Copy**

Work Schedule  Go Back More Options

« Previous 8/29/2016 - 9/4/2016 Next »

	8/29 Mon	8/30 Tue	8/31 Wed	9/1 Thu	9/2 Fri	9/3 Sat	9/4 Sun	Total
Employee 1 (Shift Supervisor)				Unavailable				0 Hrs \$0.00
Employee 2 (Manager)								0 Hrs \$0.00
Employee 3 (Team Member)								0 Hrs \$0.00
Employee 4 (Team Member)								0 Hrs \$0.00
Employee 5 (Team Member)								0 Hrs \$0.00
Employee 6 (Team Lead)								0 Hrs \$0.00
Daily Total						0 Hrs \$0.00	0 Hrs \$0.00	0 Hrs

☐ Auto Schedule this Week
☐ Clear this Week's Schedule
☒ Copy Previous Week's Schedule
☐ Add Note for this Week

Copy Previous Schedule

Select the employees to copy their schedule from the previous week

☒ Employee 1

☒ Employee 2

☒ Employee 3

☒ Employee 4

☒ Employee 5

☒ Employee 6

Select All - Unselect All

Copy Cancel

Total Labor Cost: \$0.00

Labor Percentage: 0.0% based on past 30 days ▼

5. From here you can make additional edits before finalizing the schedule

Work Schedule

[Go Back](#)
[More Options](#)

Previous
8/29/2016 - 9/4/2016
Next

	8/29 Mon	8/30 Tue	8/31 Wed	9/1 Thu	9/2 Fri	9/3 Sat	9/4 Sun	Total
Employee 1 (Shift Supervisor)	9am - 12pm 1 - 6pm		3 - 10pm	Unavailable	7am - 1pm	4 - 10pm	7am - 1pm	33 Hrs \$429.00
Employee 2 (Manager)		9am - 1pm 2 - 6pm	9am - 1pm	9am - 10pm	11am - 4pm	9am - 5pm	8am - 2pm	44 Hrs \$880.00
Employee 3 (Team Member)	5 - 8pm	Unavailable		9am - 3pm	1 - 5:15pm	6:30 - 10pm	2 - 11pm	25:45 Hrs \$257.50
Employee 4 (Team Member)	4 - 10pm	4 - 10pm			9am - 10pm		9am - 2pm	30 Hrs \$360.00
Employee 5 (Team Member)		2 - 9pm	9am - 2:45pm	3 - 8pm	Unavailable	9am - 1pm		21:45 Hrs \$206.63
Employee 6 (Team Lead)	9am - 2:30pm	11am - 2pm			1 - 5pm 6 - 10pm	10am - 3pm	2 - 10pm	29:30 Hrs \$295.00
Daily Total	22:30 Hrs \$261.00	24 Hrs \$328.50	16:45 Hrs \$225.63	24 Hrs \$367.50	36:15 Hrs \$456.50	26:30 Hrs \$361.00	34 Hrs \$428.00	184 Hrs

☐ Auto Schedule this Week
☐ Clear this Week's Schedule
☐ Copy Previous Week's Schedule
☐ Add Note for this Week

Total Labor Cost: \$2,428.13
Estimated Labor Percentage: 72.5% based on past 30 days (+55% of goal)

Auto Schedule a Week

1. Toggle to the week you want to set the schedule for by clicking **Previous** or **Next** at the top of the page near the date range
2. Click the **Auto Schedule this Week** link at the bottom left corner of the page

- a. Keep in mind that you must have a least four schedules in the system before it will allow you to auto schedule

Work Schedule

[Go Back](#)
[More Options](#)

Previous

8/29/2016 - 9/4/2016

Next

	8/29 Mon	8/30 Tue	8/31 Wed	9/1 Thu	9/2 Fri	9/3 Sat	9/4 Sun	Total
Employee 1 (Shift Supervisor)				Unavailable				0 Hrs \$0.00
Employee 2 (Manager)								0 Hrs \$0.00
Employee 3 (Team Member)		Unavailable						0 Hrs \$0.00
Employee 4 (Team Member)								0 Hrs \$0.00
Employee 5 (Team Member)					Unavailable			0 Hrs \$0.00
Employee 6 (Team Lead)								0 Hrs \$0.00
Daily Total	0 Hrs \$0.00	0 Hrs \$0.00	0 Hrs \$0.00	0 Hrs \$0.00	0 Hrs \$0.00	0 Hrs \$0.00	0 Hrs \$0.00	0 Hrs

☐ Auto Schedule this Week
 ☐ Clear this Week's Schedule
 ☐ Copy Previous Week's Schedule
 ☐ Add Note for this Week

Total Labor Cost: \$0.00
 Estimated Labor Percentage: 0.0% based on past 30 days ▼

3. You will be asked to confirm your choice. Click **OK**

store.cimplebox.com says:

This will automatically fill in your schedule for this week, would you like to proceed?

☐ Prevent this page from creating additional dialogs.

OK

Cancel

4. From here you can make additional edits before finalizing the schedule

Work Schedule
Go Back
More Options

Previous

8/29/2016 - 9/4/2016

Next

	8/29 Mon	8/30 Tue	8/31 Wed	9/1 Thu	9/2 Fri	9/3 Sat	9/4 Sun	Total
Employee 1 (Shift Supervisor)	9am - 6pm		3 - 10pm	Unavailable	7am - 1pm	4 - 10pm	7am - 1pm	34 Hrs \$442.00
Employee 2 (Manager)		9am - 1pm 2 - 6pm	9am - 1pm	9am - 10pm	11am - 4pm	9am - 5pm	8am - 2pm	44 Hrs \$880.00
Employee 3 (Team Member)	5 - 8pm	Unavailable		9am - 3pm	1 - 5:15pm	6:30 - 10pm	2 - 11pm	25:45 Hrs \$257.50
Employee 4 (Team Member)	4 - 10pm	4 - 10pm			9am - 10pm		9am - 2pm	30 Hrs \$360.00
Employee 5 (Team Member)		2 - 9pm	9am - 2:45pm	3 - 8pm	Unavailable	9am - 1pm		21:45 Hrs \$206.63
Employee 6 (Team Lead)		11am - 2pm			1 - 5pm 6 - 10pm	10am - 3pm	2 - 10pm	24 Hrs \$240.00
Daily Total	18 Hrs \$219.00	24 Hrs \$328.50	16:45 Hrs \$225.63	24 Hrs \$367.50	36:15 Hrs \$456.50	26:30 Hrs \$361.00	34 Hrs \$428.00	179:30 Hrs

Auto Schedule this Week

Clear this Week's Schedule

Copy Previous Week's Schedule

Add Note for this Week

Total Labor Cost: \$2,386.13

Estimated Labor Percentage: 71.2% based on past 30 days (+53% of goal)

Clearing a Schedule

You can clear a schedule at any time before it has been finalized. To clear a schedule:

1. Click the **Clear this Week's Schedule** link at the bottom left corner of the page

Work Schedule
Go Back
More Options

Previous
8/29/2016 - 9/4/2016
Next

	8/29 Mon	8/30 Tue	8/31 Wed	9/1 Thu	9/2 Fri	9/3 Sat	9/4 Sun	Total
Employee 1 (Shift Supervisor)	9am - 12pm 1 - 6pm		3 - 10pm	Unavailable	7am - 1pm	4 - 10pm	7am - 1pm	33 Hrs \$429.00
Employee 2 (Manager)		9am - 1pm 2 - 6pm	9am - 1pm	9am - 10pm	11am - 4pm	9am - 5pm	8am - 2pm	44 Hrs \$880.00
Employee 3 (Team Member)	5 - 8pm	Unavailable		9am - 3pm	1 - 5:15pm	6:30 - 10pm	2 - 11pm	25:45 Hrs \$257.50
Employee 4 (Team Member)	4 - 10pm	4 - 10pm			9am - 10pm		9am - 2pm	30 Hrs \$360.00
Employee 5 (Team Member)		2 - 9pm	9am - 2:45pm	3 - 8pm	Unavailable	9am - 1pm		21:45 Hrs \$206.63
Employee 6 (Team Lead)	9am - 2:30pm	11am - 2pm			1 - 5pm 6 - 10pm	10am - 3pm	2 - 10pm	29:30 Hrs \$295.00
Daily Total	22:30 Hrs \$261.00	24 Hrs \$328.50	16:45 Hrs \$225.63	24 Hrs \$367.50	36:15 Hrs \$456.50	26:30 Hrs \$361.00	34 Hrs \$428.00	184 Hrs

☐ Auto Schedule this Week
 ☒ **Clear this Week's Schedule**
☐ Copy Previous Week's Schedule
 ☐ Add Note for this Week

Total Labor Cost: \$2,428.13
 Estimated Labor Percentage: 72.5% based on past 30 days (+55% of goal)

2. You will be asked to confirm your choice. Click **OK**

store.cimplebox.com says:

Are you sure you want to clear this schedule?

☐ Prevent this page from creating additional dialogs.

OK

Cancel

3. The schedule will be reset to a blank schedule reflecting only set unavailability

Work Schedule

☐ Go Back
 ☐ More Options

<< Previous
 8/29/2016 - 9/4/2016
 Next >>

	8/29 Mon	8/30 Tue	8/31 Wed	9/1 Thu	9/2 Fri	9/3 Sat	9/4 Sun	Total
Employee 1 (Shift Supervisor)				Unavailable				0 Hrs \$0.00
Employee 2 (Manager)								0 Hrs \$0.00
Employee 3 (Team Member)		Unavailable						0 Hrs \$0.00
Employee 4 (Team Member)								0 Hrs \$0.00
Employee 5 (Team Member)					Unavailable			0 Hrs \$0.00
Employee 6 (Team Lead)								0 Hrs \$0.00
Daily Total	0 Hrs \$0.00	0 Hrs \$0.00	0 Hrs \$0.00	0 Hrs \$0.00	0 Hrs \$0.00	0 Hrs \$0.00	0 Hrs \$0.00	0 Hrs

☐ Auto Schedule this Week
☐ Clear this Week's Schedule
☐ Copy Previous Week's Schedule
☐ Add Note for this Week

Total Labor Cost: \$0.00
 Estimated Labor Percentage: 0.0% based on past 30 days ▼

Related Topics:

[Add a Note for Current Week](#)

[Communicating Work Schedules](#)

Add Note for Current Week

In this module, you will learn:

- How to add a note to the work schedule within Console

Adding a Note to the Work Schedule

To add a note to the work schedule you will need to navigate to the **Labor Management** module and click **Work Schedule**.

The screenshot displays the NCR Silver console interface. At the top, the 'Dashboard' tab is selected, and the store name 'PTC Concierge Support' is shown. A dropdown menu is open under the 'Store' tab, with 'Labor' highlighted. A green arrow points from the 'Labor' option to the 'Work Schedule' option in the 'Labor Management' module below. The 'Labor Management' module contains several options: 'Employees', 'Time Card', 'Employee Availability', and 'Work Schedule'. The 'Work Schedule' option is highlighted with a green box. Below the 'Work Schedule' option, there is a description: 'Manage your staff's schedule. Try using the Auto Schedule feature.'

Dashboard

Store: **PTC Concierge Support**

Alerts

Message	Date
Unavailability Received	3/29/2016

Current

Sales By Day

Today Prev Week Prev Year

Monthly Progress

Filter by Store: All Stores [Change]

Labor Management

Employees
Manage your employee information and their preferences, including scheduling preferences

Time Card
Enter and manage the hours your employee clock-in for their shift


Employee Availability
Set and track your employees' schedule availability

Work Schedule
Manage your staff's schedule. Try using the Auto Schedule feature.

Roles
Assign your crew members to various department and roles to help you organize your team

To Add a Note to the Work Schedule

1. Toggle to the week you want to set the schedule for by clicking **Previous** or **Next** at the top of the page near the date range
2. Click the **Add Note for this Week** link at the bottom left corner of the page
3. Enter the desired message in the floating window that appears
 - a. The message will appear on any printed work schedule
4. Click **Save**

Work Schedule  Go Back More Options


Previous 8/22/2016 - 8/28/2016 Next

	8/22 Mon	8/23 Tue	8/24 Wed	8/25 Thu	8/26 Fri	8/27 Sat	8/28 Sun	Total
Employee 1 (Shift Supervisor)	9am - 12pm 1 - 6pm		3 - 10pm	Unavailable	7am - 1pm	4 - 10pm	7am - 1pm	33 Hrs \$429.00
Employee 2 (Manager)		9am - 1pm 2 - 6pm	9am - 1pm	9am - 10pm	11am - 4pm	9am - 5pm	8am - 2pm	44 Hrs \$880.00
Employee 3 (Team Member)	5 - 8pm							25:45 Hrs \$257.50
Employee 4 (Team Member)	4 - 10pm							30 Hrs \$360.00
Employee 5 (Team Member)								21:45 Hrs \$206.63
Employee 6 (Team Lead)	9am - 2:30pm							29:30 Hrs \$295.00
Daily Total	22:30 Hrs \$261.00							184 Hrs

Cost: \$2,428.13

Estimated Labor Percentage: 38.8% based on past 30 days (+21% of goal)

☐ Auto Schedule this Week
☐ Clear this Week's Schedule
☐ Copy Previous Week's Schedule
☐ Add Note for this Week

Note for this Week 

This note will be included when you print this week's schedule

Save Cancel

Related Topics:

[Creating a Work Schedule](#)

[Communicating Schedules](#)

Communicating Schedules

In this module, you will learn:

- How to communicate finalized work schedules within Console

Communicating a Work Schedule

To communicate a work schedule you will need to navigate to the **Labor Management** module and click **Work Schedule**.

The screenshot displays the NCR Silver console interface. At the top, the 'Dashboard' tab is selected. Below it, the 'Store: PTC Concierge Support' is shown. A dropdown menu is open under the 'Store' tab, with 'Labor' highlighted. A green arrow points from the 'Labor' option to the 'Work Schedule' option in the 'Labor Management' module. The 'Work Schedule' option is also highlighted with a green box. The 'Labor Management' module contains several options: 'Employees', 'Time Card', 'Employee Availability', and 'Work Schedule'. The 'Work Schedule' option is described as 'Manage your staff's schedule. Try using the Auto Schedule feature.' The 'Time Card' option is described as 'Enter and manage the hours your employee clock-in for their shift'. The 'Employee Availability' option is described as 'Set and track your employees' schedule availability'. The 'Employees' option is described as 'Manage your employee information and their preferences, including scheduling preferences'. The 'Roles' option is described as 'Assign your crew members to various department and roles to help you organize your team'.

Dashboard

Store: **PTC Concierge Support**

Alerts

Message	Date
Unavailability Received	3/29/2016

View All

Current

Sales By Day

Today Prev Week Prev Year

Monthly Progress

Filter by Store: All Stores [Change]

Day-to-Day Labor Planning Product

Labor Management Go Back

Employees
Manage your employee information and their preferences, including scheduling preferences

Time Card
Enter and manage the hours your employee clock-in for their shift

Employee Availability
Set and track your employees' schedule availability

Work Schedule
Manage your staff's schedule. Try using the Auto Schedule feature.

Roles
Assign your crew members to various department and roles to help you organize your team

You will have three options for communicating a finalized schedule:

- Print a copy of the work schedule for team member reference
- Send the work schedule via text or email
- Publish the work schedule which sends it to the employee portal

Work Schedule ⓘ

Previous 8/22/2016 - 8/28/2016 Next

More Options

	8/22 Mon	8/23 Tue	8/24 Wed	8/25 Thu	8/26 Fri	8/27 Sat		
Employee 1 (Shift Supervisor)	9am - 12pm 1 - 6pm		3 - 10pm	Unavailable	7am - 1pm	4 - 10pm		\$425.00
Employee 2 (Manager)		9am - 1pm 2 - 6pm	9am - 1pm	9am - 10pm	11am - 4pm	9am - 5pm	8am - 2pm	44 Hrs \$880.00
Employee 3 (Team Member)	5 - 8pm	Unavailable		9am - 3pm	1 - 5:15pm	6:30 - 10pm	2 - 11pm	25:45 Hrs \$257.50
Employee 4 (Team Member)	4 - 10pm	4 - 10pm			9am - 10pm		9am - 2pm	30 Hrs \$360.00
Employee 5 (Team Member)		2 - 9pm	9am - 2:45pm	3 - 8pm	Unavailable	9am - 1pm		21:45 Hrs \$206.63
Employee 6 (Team Lead)	9am - 2:30pm	11am - 2pm			1 - 5pm 6 - 10pm	10am - 3pm	2 - 10pm	29:30 Hrs \$295.00
Daily Total	22:30 Hrs \$261.00	24 Hrs \$328.50	16:45 Hrs \$225.63	24 Hrs \$367.50	36:15 Hrs \$456.50	26:30 Hrs \$361.00	34 Hrs \$428.00	184 Hrs

☐ Auto Schedule this Week
☐ Clear this Week's Schedule
☐ Copy Previous Week's Schedule
☐ Add Note for this Week

Total Labor Cost: \$2,428.13

Estimated Labor Percentage: 38.8% based on past 30 days (+21% of goal) ▼

More Options

- Print Schedule
- Send Schedule
- Publish Schedule
- Schedule Options

Print a Work Schedule

1. Toggle to the week you want to print the schedule for by clicking **Previous** or **Next** at the top of the page near the date range
2. Click **More Options** at the top of the page

Work Schedule ⓘ

Previous 8/22/2016 - 8/28/2016 Next

More Options

	8/22 Mon	8/23 Tue	8/24 Wed	8/25 Thu	8/26 Fri	8/27 Sat		
Employee 1 (Shift Supervisor)	9am - 12pm 1 - 6pm		3 - 10pm	Unavailable	7am - 1pm	4 - 10pm		\$425.00

More Options

- Print Schedule
- Send Schedule
- Publish Schedule
- Schedule Options

3. Click **Print**

4. Click **Send**

Email Schedule ⓘ

8/22/2016 - 8/28/2016

Name	Email	Mobile Text Message**
Employee 1	<input checked="" type="checkbox"/> employee1@wbdemo.com (Click to change email)	<input type="checkbox"/> 8183427722
Employee 2	<input checked="" type="checkbox"/> employee2@wbdemo.com (Click to change email)	<input type="checkbox"/> 8181234567
Employee 3	<input checked="" type="checkbox"/> employee3@wbdemo.com (Click to change email)	<input type="checkbox"/> 8184564567

[▶ Add message to employees \(Email only\)](#)
[▶ View Example](#)
[▶ View Example](#)

** Not scheduled*

*** Standard messaging charges from your service provider may apply*

Publish a Work Schedule

1. Toggle to the week you want to print the schedule for by clicking **Previous** or **Next** at the top of the page near the date range
2. Click **More Options** at the top of the page

Work Schedule ⓘ

[◀ Previous](#)
8/22/2016 - 8/28/2016
 [Next ▶](#)

	8/22 Mon	8/23 Tue	8/24 Wed	8/25 Thu	8/26 Fri	8/27 Sat
Employee 1 (Shift Supervisor)	9am - 12pm 1 - 6pm		3 - 10pm	Unavailable	7am - 1pm	4 - 10pm


[More Options](#)

[Print Schedule](#)
[Send Schedule](#)
[Publish Schedule](#)
[Schedule Options](#)

3. Click **Publish**

- a. Click **Publish** from the floating window that appears to confirm your choice

- i. This finalizes the schedule and sends it to the Employee portal for employee reference

Work Schedule  Go Back More Options

Previous 8/29/2016 - 9/4/2016 Next

	8/29 Mon	8/30 Tue	8/31 Wed	9/1 Thu	9/2 Fri	9/3 Sat	
Employee 1 (Shift Supervisor)	9am - 12pm 1 - 6pm		3 - 10pm	Unavailable	7am - 1pm	4 - 10pm	44 Hrs \$880.00
Employee 2 (Manager)					9am - 5pm	8am - 2pm	25:45 Hrs \$257.50
Employee 3 (Team Member)	5 - 8pm				6:30 - 10pm	2 - 11pm	30 Hrs \$360.00
Employee 4 (Team Member)	4 - 10pm					9am - 2pm	21:45 Hrs \$206.63
Employee 5 (Team Member)					9am - 1pm		29:30 Hrs \$295.00
Employee 6 (Team Lead)	9am - 2:30pm				10am - 3pm	2 - 10pm	
Daily Total	22:30 Hrs \$261.00	\$328.50	\$225.63	\$367.50	\$456.50	26:30 Hrs \$361.00	34 Hrs \$428.00
							184 Hrs

Publish Schedule

By "publishing" this week's schedule, your crew members will have access to their schedule through the Employee Portal. To find out more about granting your crew members access to the Employee Portal, [click here](#).

Click "Publish" to continue.

☐ Auto Schedule this Week
☐ Clear this Week's Schedule
☐ Copy Previous Week's Schedule
☐ Add Note for this Week

Total Labor Cost: \$2,428.13

Estimated Labor Percentage: 72.5% based on past 30 days (+55% of goal) ▼

Related Topics:

[Creating a Work Schedule](#)

[Add a Note for Current Week](#)

Time Card

In this module, you will learn:

- How to view time card data within Console

Time Cards

The time card feature tracks clock-ins and clock-outs for your employees. It also provides you the ability to export time card information for payroll purposes (see the **Export Time Card training module** for more information).

To view time card data you will need to navigate to the **Labor Management** module and click **Time Card**.

The screenshot shows the NCR Silver dashboard for a store named "PTC Concierge Support". The top navigation bar includes "Dashboard", "Store", "Reports", and "Resources". The "Store" dropdown menu is open, showing options: "Day-to-Day", "Labor", "Planning", and "Product". The "Labor" option is highlighted with a green box. A green arrow points from this box to the "Time Card" option in the "Labor Management" section below. The "Labor Management" section contains four options: "Employees", "Work Schedule", "Roles", and "Time Card". The "Time Card" option is highlighted with a green box and includes the description: "Enter and manage the hours your employee clock-in for their shift".

Dashboard

Store: **PTC Concierge Support**

Alerts

Message	Date
Unavailability Received	3/29/2016

View All

Current

Sales By Day

Today Prev Week Prev Year

Monthly Progress

Filter by Store: All Stores [Change]

Bar chart showing Monthly Progress (Sales by Day) for May 16, Jun 16, and Jul 16.

Month	Sales
May 16	\$45.8K
Jun 16	\$52.8K
Jul 16	\$1.7K

Labor Management

Go Back

Employees
Manage your employee information and their preferences, including scheduling preferences

Work Schedule
Manage your staff's schedule. Try using the Auto Schedule feature.

Roles
Assign your crew members to various department and roles to help you organize your team

Time Card
Enter and manage the hours your employee clock-in for their shift

Employee Availability
Set and track your employees' schedule availability

Time Card Features

1. Toggle to the week you want to view by clicking **Previous** or **Next** at the top of the page near the date range

- a. Total hours and total wage will be displayed at the bottom of the time card

Time Card
Go Back More Options

Previous
6/27/2016 - 7/3/2016
Next

Name	Pay Rate	Total Hrs	Wage
haley moore	Enter Rate	5.100	\$0.00
Cynthia Ireland	\$10.00 *	0.000	\$0.00
A. JACKSON	\$7.25 *	11.612	\$84.19
ASHLY RAMUS	\$7.35 *	16.704	\$122.77
chandler tharp	\$7.25 *	16.853	\$122.19
Week Totals:		128.712	\$646.49

* There was a pay rate change during this period

2. Click **Enter Rate** to set the pay rate for any employees that this has not yet been established for
3. Click **Save**

Name	Pay Rate	Total Hrs	Wage
haley moore	Enter Rate	5.100	\$0.00
Cynthia Ireland	\$10.00 *	0.000	\$0.00
A. JACKSON	\$7.25 *	11.612	\$84.19
ASHLY RAMUS	\$7.35 *	16.704	\$122.77
chandler tharp	\$7.25 *	16.853	\$122.19

haley moore
✕

Pay Rate:

Effective Date: (e.g. 7/4/2008)

4. Click an Employee's name to access their time card information
 - a. You have the option to view their hours by decimal value or by time value. At the bottom left corner of the page click:
 - i. View as decimal value, or
 - ii. View as time value

- b. You can also edit time card information by click **Edit Time Card** at the bottom right corner of the page

Time Card: A. JACKSON ⓘ

Go Back
More Options

Previous
6/27/2016 - 7/3/2016
Next

Date	Clock In	Clock Out	Hours	Wage
Monday, 6/27			0.000	
Tuesday, 6/28	14.61	21.06	6.451	\$46.77
Wednesday, 6/29			0.000	\$0.00
Thursday, 6/30	15.03	20.19		
	20.24	20.24	5.161	\$37.42
Friday, 7/1			0.000	\$0.00
Saturday, 7/2			0.000	\$0.00
Sunday, 7/3			0.000	\$0.00
Week Total :			11.612	\$84.19

☒ View as decimal value
☐ View as time value

Edit Time Card

- i. If you choose to edit time card information, make the necessary changes and click **Save and Finish**
- ii. Keep in mind that Console is continuously polling the POS. When we do, we go back approximately 3 weeks each time we grab labor hours to ensure we reflect what occurs on the POS. *For this reason, we recommend that if changes need to be made to the time*

card, they be made in NCR Silver.

Time Card: A. JACKSON
More Options

Previous
6/27/2016 - 7/3/2016
Next

Date	Clock In	Clock Out		Hours	Wage
Monday, 6/27			[Add More Shifts]	0.00	
Tuesday, 6/28	14.61	21.06	[Add More Shifts]	6.45	\$46.76
Wednesday, 6/29			[Add More Shifts]	0.00	\$0.00
Thursday, 6/30	15.03	20.19		5.16	\$37.41
	20.24	20.24	[Add More Shifts]		
Friday, 7/1			[Add More Shifts]	0.00	\$0.00
Saturday, 7/2			[Add More Shifts]	0.00	\$0.00
Sunday, 7/3			[Add More Shifts]	0.00	\$0.00
Week Total :				11.61	\$84.17

Save Save and Finish Cancel

☒ View as decimal value
 ☐ View as time value

Related Topics:

[Export a Time Card](#)

[Import a Time Card](#)

Export a Time Card

In this module, you will learn:

- How to export time card data within Console

Time Cards

The time card feature allows you to export time card information for payroll purposes.

To export time card data you will need to navigate to the **Labor Management** module and click **Time Card**.

The screenshot displays the NCR Silver console interface. At the top, the 'Dashboard' tab is selected. Below it, the 'Store: PTC Concierge Support' is shown. The 'Labor' option in the 'Day-to-Day' menu is highlighted with a green box. A green arrow points from this box to the 'Time Card' option in the 'Labor Management' module, which is also highlighted with a green box. The 'Time Card' option is described as 'Enter and manage the hours your employee clock-in for their shift'.

Dashboard

Store: **PTC Concierge Support**

Alerts

Message	Date
Unavailability Received	3/29/2016

Current

Sales By Day

Today Prev Week Prev Year

Monthly Progress

Filter by Store: All Stores [Change]

Labor Management

Time Card
Enter and manage the hours your employee clock-in for their shift

Employees
Manage your employee information and their preferences, including scheduling preferences

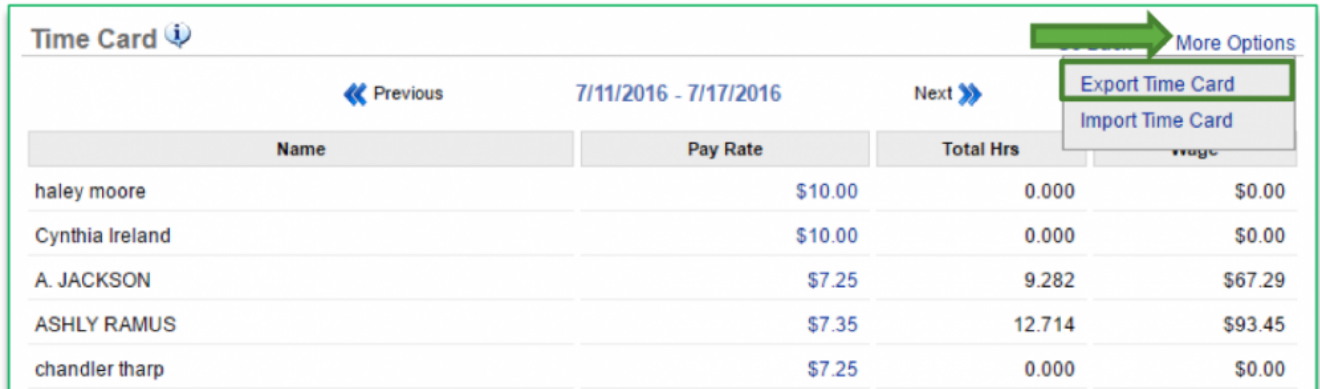
Work Schedule
Manage your staff's schedule. Try using the Auto Schedule feature.

Roles
Assign your crew members to various department and roles to help you organize your team

Employee Availability
Set and track your employees' schedule availability

Exporting Time Card Data

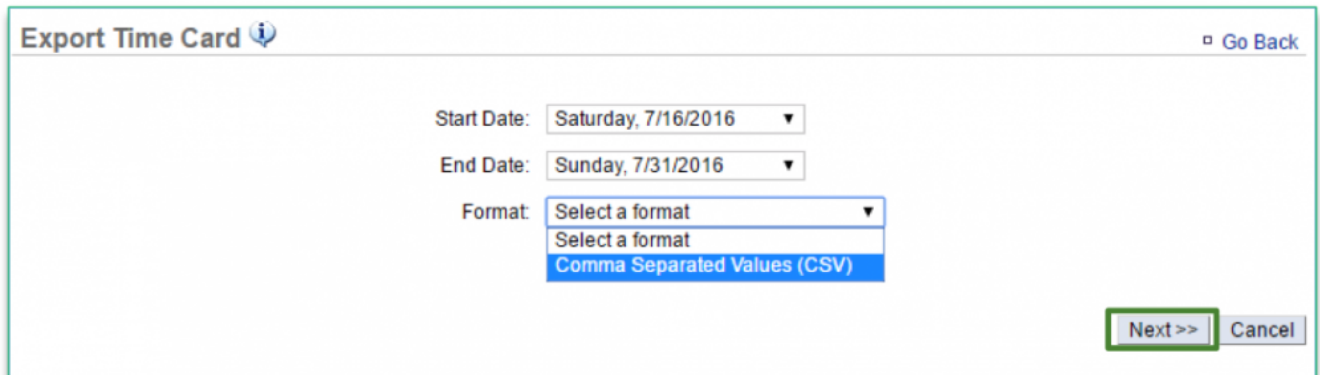
1. Toggle to the week you want to view by clicking **Previous** or **Next** at the top of the page near the date range
2. Click **More Options**
3. Click **Export Time Card**



The screenshot shows the 'Time Card' interface. At the top, there are navigation links for 'Previous' and 'Next' around the date range '7/11/2016 - 7/17/2016'. Below this is a table with columns: Name, Pay Rate, Total Hrs, and an unlabeled column. The table lists five employees: haley moore, Cynthia Ireland, A. JACKSON, ASHLY RAMUS, and chandler tharp. To the right of the table, a 'More Options' dropdown menu is open, showing 'Export Time Card' and 'Import Time Card'. A green arrow points to the 'More Options' button, and a green box highlights the 'Export Time Card' option.

Name	Pay Rate	Total Hrs	
haley moore	\$10.00	0.000	\$0.00
Cynthia Ireland	\$10.00	0.000	\$0.00
A. JACKSON	\$7.25	9.282	\$67.29
ASHLY RAMUS	\$7.35	12.714	\$93.45
chandler tharp	\$7.25	0.000	\$0.00


4. Select the **Start Date**
5. Select the **End Date**
6. Click the dropdown arrow to the right of **Format** to select **Comma Separated Values (CSV)**
7. Click **Next**



The screenshot shows the 'Export Time Card' interface. It has a 'Go Back' link at the top right. Below, there are fields for 'Start Date' (Saturday, 7/16/2016) and 'End Date' (Sunday, 7/31/2016). A 'Format' dropdown menu is open, showing 'Select a format' and 'Comma Separated Values (CSV)'. At the bottom right, there are 'Next >>' and 'Cancel' buttons. A green box highlights the 'Next >>' button.

8. Select the employees you wish to export timecard information for

9. Click **Export**

Export Time Card  Go Back

Pay Period : 7/16/2016 - 7/31/2016

Employees at : Multiple Stores

Name	ID	Total Hours
------	----	-------------

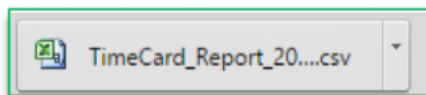
Employees at : Demo Store

Name	ID	Total Hours
<input checked="" type="checkbox"/> haley moore		14.641
<input checked="" type="checkbox"/> Cynthia Ireland		26.653
<input checked="" type="checkbox"/> A. JACKSON		20.511
<input checked="" type="checkbox"/> ASHLY RAMUS		8.978
<input checked="" type="checkbox"/> CHAREKA JACKSON		4.857
<input checked="" type="checkbox"/> christian paterson		25.966
<input checked="" type="checkbox"/> GARFEILD WOODRAFLE		28.927
<input checked="" type="checkbox"/> Hailey brodie		28.565
<input checked="" type="checkbox"/> Eleni Vincent		6.239
<input checked="" type="checkbox"/> Brandon Tucker		25.360

Export **Cancel**

10. A file will appear at the bottom of the screen. Click the file to open it

11. Save it to your computer



Related Topics:

[Time Card](#)

[Import a Time Card](#)

Import a Time Card

In this module, you will learn:

- How to import time card data within Console

Time Cards

The time card feature allows you to import time card information for payroll purposes.

To export time card data you will need to navigate to the **Labor Management** module and click **Time Card**.

The screenshot displays the NCR Silver console interface. At the top, the 'Dashboard' tab is selected. Below it, the 'Store: PTC Concierge Support' is shown. The 'Dashboard' section includes 'Alerts' (Unavailability Received on 3/29/2016) and 'Current' (Sales By Day). A 'Monthly Progress' bar chart shows sales from May 16 to Jul 16. On the right, a dropdown menu is open under the 'Store' tab, with 'Labor' highlighted. A green arrow points from the 'Labor' option to the 'Time Card' feature in the 'Labor Management' module. The 'Labor Management' module contains four options: 'Employees', 'Work Schedule', 'Roles', and 'Time Card'. The 'Time Card' option is highlighted with a green box and a green arrow pointing to it from the 'Labor' dropdown.

Dashboard

Store: **PTC Concierge Support**

Alerts

Message	Date
Unavailability Received	3/29/2016

Current

Sales By Day

Today Prev Week Prev Year

Monthly Progress

\$60K \$48K \$36K \$24K \$12K \$0

May 16 Jun 16 Jul 16

Labor Management

Time Card
Enter and manage the hours your employee clock-in for their shift

Employees
Manage your employee information and their preferences, including scheduling preferences

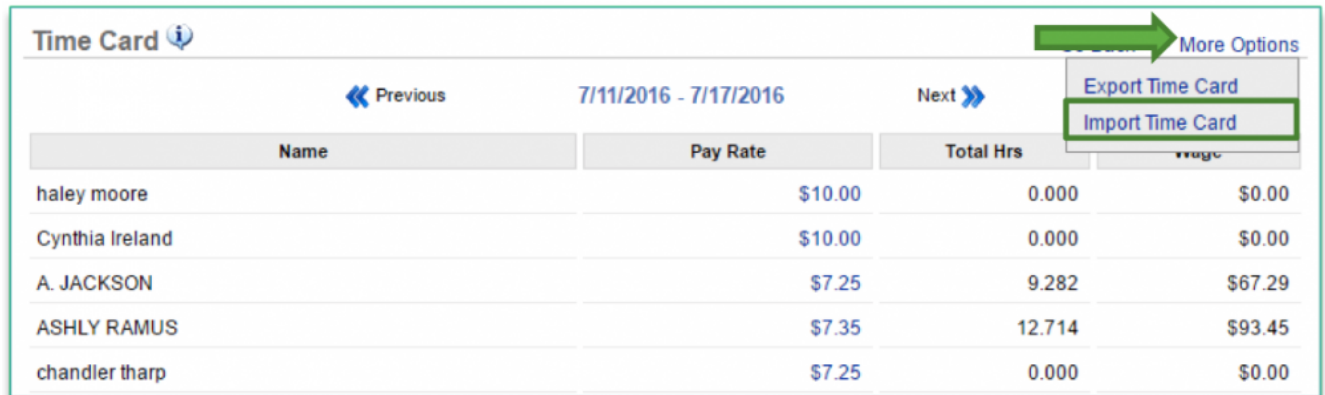
Work Schedule
Manage your staff's schedule. Try using the Auto Schedule feature.

Roles
Assign your crew members to various department and roles to help you organize your team

Employee Availability
Set and track your employees' schedule availability

Importing Time Card Data

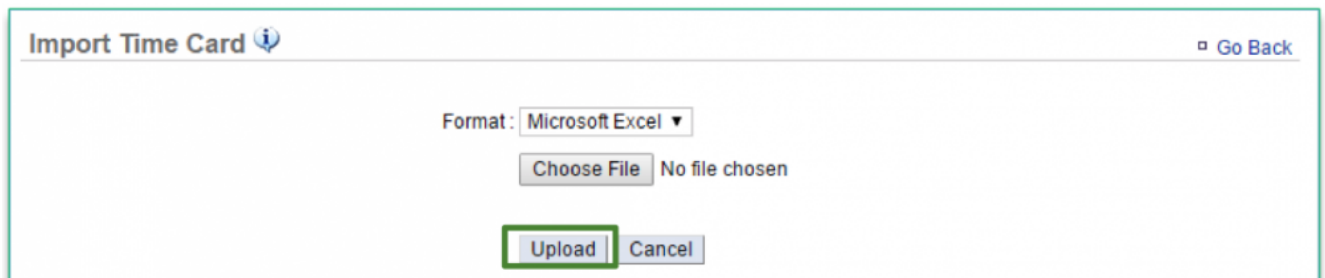
1. Toggle to the week you want to view by clicking **Previous** or **Next** at the top of the page near the date range
2. Click **More Options**
3. Click **Import Time Card**



The screenshot shows the 'Time Card' interface. At the top, there are navigation links 'Previous' and 'Next' flanking the date range '7/11/2016 - 7/17/2016'. Below this is a table with columns: Name, Pay Rate, Total Hrs, and Wage. The table lists five employees: haley moore, Cynthia Ireland, A. JACKSON, ASHLY RAMUS, and chandler tharp. To the right of the table, a 'More Options' dropdown menu is open, showing 'Export Time Card' and 'Import Time Card' (which is highlighted with a green box). A green arrow points from the 'More Options' link to the dropdown menu.

Name	Pay Rate	Total Hrs	Wage
haley moore	\$10.00	0.000	\$0.00
Cynthia Ireland	\$10.00	0.000	\$0.00
A. JACKSON	\$7.25	9.282	\$67.29
ASHLY RAMUS	\$7.35	12.714	\$93.45
chandler tharp	\$7.25	0.000	\$0.00

4. The format defaults to the required file type (Excel)
5. Click **Choose File** to select the file
6. Click **Upload**



The screenshot shows the 'Import Time Card' form. At the top right is a 'Go Back' link. Below the title, there is a 'Format:' dropdown menu set to 'Microsoft Excel'. Below this is a 'Choose File' button with the text 'No file chosen' next to it. At the bottom, there are two buttons: 'Upload' (highlighted with a green box) and 'Cancel'.

Related Topics:

[Time Card Overview](#)

[Export a Time Card](#)

Employee Training

This section illustrates how a manager can assign training videos and certification tests as well as how employees access and complete those requests. Click on a topic below for more detailed information.

[How to Assign Training Videos and Certification Tests](#)

[How Employees Access Training](#)

Need a training video or certification test uploaded to your CimpleBox site? Contact us via email at support@cimplebox.com so we can help!



Remember: Training materials can be uploaded to your **Resources** section (within Documents) for team member reference at any time. Click [here](#) for more detailed information about how to upload a document.

Assign Training

The purpose of this section is to illustrate how to assign training videos and certification tests to your employees.

How to Assign a Test or Video

STEP 1: From your Dashboard view, mouse over the **Resources** tab and click **Training**.

The screenshot shows the NCR Silver dashboard interface. At the top, there are tabs for Dashboard, Store, Reports, and Resources. The Resources tab is highlighted, and a dropdown menu is open, showing options: Documents, Training, and Photo Gallery. The Training option is selected. Below the navigation bar, the dashboard displays various widgets including Alerts, Compare (Sales By Day and Sales By Week), Monthly Progress (a bar chart), Weather Forecast, Today's Schedule, and Current Sales Performance (a table).

Alerts

Message	Date
Unrecognized Clock-In Employee from POS	5/16/2017

[View All](#)

Compare

Sales By Day

	Today	Prev Week	Prev Year
Sales	\$253	\$562	\$391
Checks	10	10	6
Average Check	\$25.27	\$56.22	\$65.16

[Previous Day](#)

Sales By Week

	Curr WTD	Prev WTD	Prev Yr WTD
Sales	\$313	\$575	\$456
Checks	14	11	11
Average Check	\$22.36	\$52.24	\$41.44

Monthly Progress

Weather Forecast

PTC Concierge Support, Silver Gift Shoppe

Today (5/16)	Tomorrow (5/17)	Thu (5/18)
91° 63°	91° 66°	88° 66°

[View Full 5-Day Forecast](#)

Today's Schedule

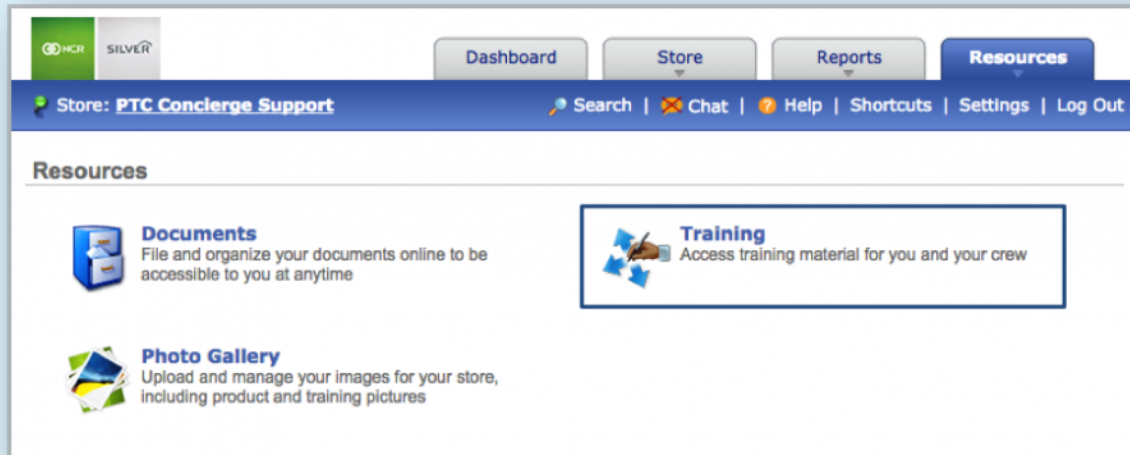
Sales Forecast

Basis	Year Sales	Week Sales
4 Weeks	\$160,562	\$3,088

Current Sales Performance

	May Sales	Target	May 2016 MTD
PTC Concierge Support..	\$1,749	N/A	\$11,480
Silver Gift Shoppe	\$170	N/A	\$2,071

* **Hint:** You can also access Training by clicking on the **Resources** tab and then on **Training** from the Resources screen.



STEP 2: From the *Training* screen, select the class or subject you wish to access. You can set up subjects (folders) within classes to drill down to specific training videos or certification tests.

The image shows three overlapping screenshots of the Training screen, illustrating a drill-down process:


- Top Screenshot (Top Level):** Shows a table with columns 'Name' and 'Total Classes'. The 'Crew Member Training' folder is highlighted with a blue box. The table data is as follows:


Name	Total Classes
Cake Decorator Training	0
Crew Member Training	17
- Middle Screenshot (Crew Member Training):** Shows the 'Crew Member Training' folder selected. The breadcrumb trail is 'Top Level > Crew Member Training'. A 'Up One Level' link is visible. The table data is as follows:

Name	Total Classes
Guest Service	0
Ice Cream	0
Soft Serve	7
- Bottom Screenshot (Soft Serve):** Shows the 'Soft Serve' folder selected. The breadcrumb trail is 'Top Level > Crew Member Training > Soft Serve'. A 'Up One Level' link is visible. The table lists the following subjects:


Name	Total Classes
Introduction	
Swirls	
Strawberry Sundae	
Opening Procedure	
Daily Maintenance	
Closing Procedure	
Mix n Machine	

STEP 3: Select the video or test you want to assign and click ***Assign this class*** to the right of the image or video.

Training 

Top Level > Crew Member Training > Soft Serve Up One Level 


Introduction



Last Modified : 6/5/2008
Total Views : 10
Rating : ★★☆☆☆

Assign this class

00:00:00/00:00:34

01 - Introduction

STEP 4: Select the employees you wish to assign the video or test to and click **Save**. Click **Cancel** to cancel your request and return to the previous screen.

Assign Class

Go Back

	Employee	Viewed	Completed	Approved
<input type="checkbox"/>	Employee 1	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/>	Employee 2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/>	Employee 3	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/>	Employee 4	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/>	Employee 5	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/>	Employee 6	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/>	Employee 7	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/>	Employee 8	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/>	Employee 9	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/>	Employee 10	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/>	Employee 11	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/>	Employee 12	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/>	Employee 13	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/>	Employee 14	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Save

Cancel

Check an Employee's Progress


STEP 1: From your Dashboard view, mouse over the **Store** tab and click **Labor**.

The screenshot shows the NCR Silver dashboard for the store "PTC Conclerge Support". The top navigation bar includes "Dashboard", "Store", "Reports", and "Resources". The "Store" tab is active, and a dropdown menu is open, showing options: "Day-to-Day", "Labor", "Planning", and "Product". The "Labor" option is highlighted. Below the navigation bar, the dashboard displays an "Alerts" section with a message about an unrecognized clock-in employee, a "Compare" section with a "Sales By Day" table, and a "Monthly Progress" bar chart.

	Today	Prev Week	Prev Year
Sales	\$50	\$13	\$65
Checks	3	1	5
Average Check	\$16.70	\$12.50	\$12.97

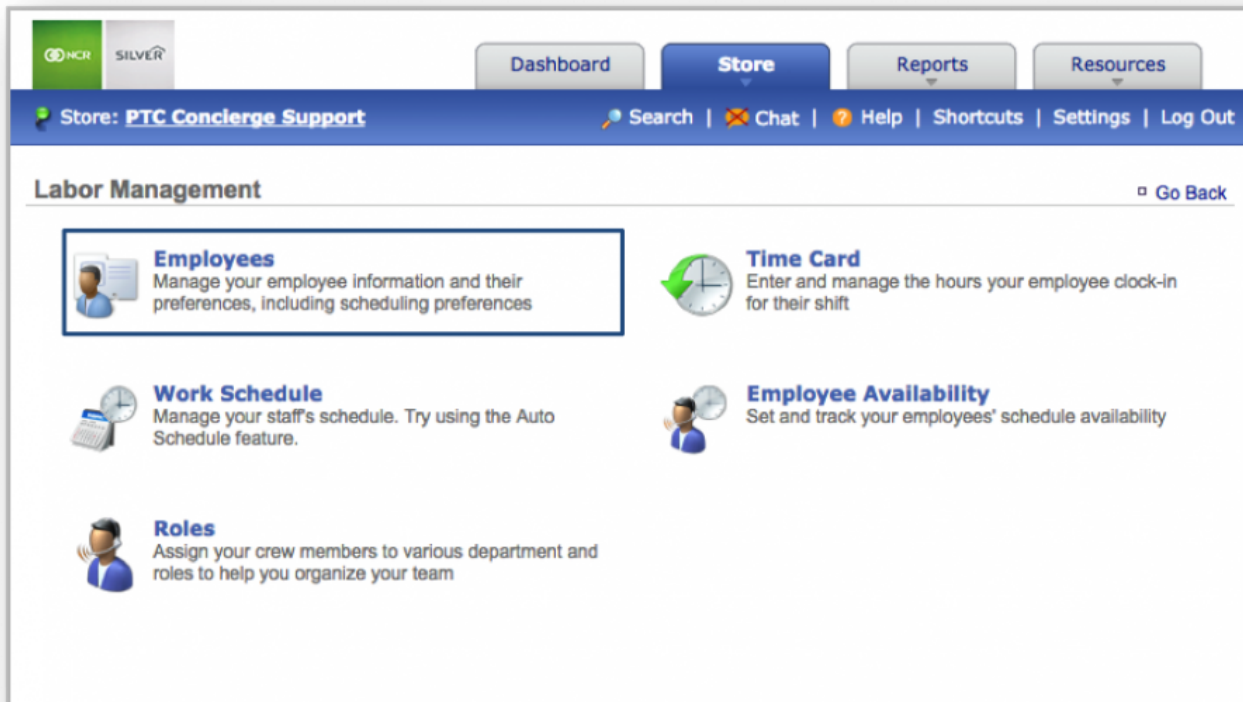
Monthly Progress chart data (approximate values):

Month	PTC Conclerge Support	Silver Gift Shoppe	Silver Shopping
Mar 17	\$256.1K	\$1.9K	\$1.9K
Apr 17	\$33	\$551.5	\$1.7K
May 17	\$97.6	\$488.3	

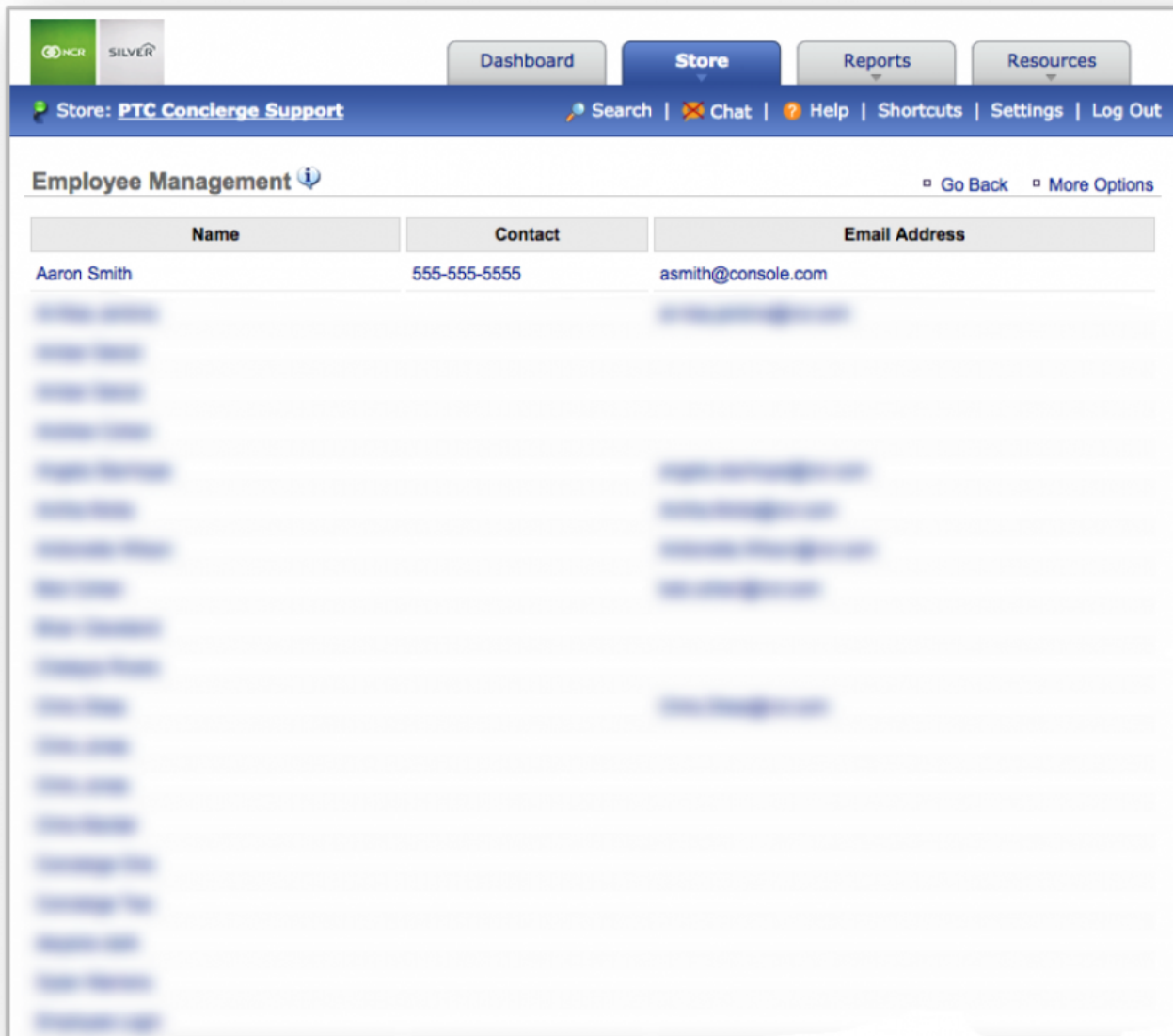
 **Hint:** You can also access Labor by clicking on the **Store** tab and then on **Labor** from the Store Management screen.

The screenshot shows the "Store Management" screen for the store "PTC Conclerge Support". The "Store" tab is active. The screen displays four main management areas: "Day-to-Day" (View daily, weekly, and monthly data for your store, including sales and transaction count), "Labor" (Manage your employees, roles and their shifts. One place to manage your entire labor force), "Planning" (Increase value and efficiency by setting goals for your store and tracking your performance against them), and "Product" (Manage products and inventory items sold at your store). The "Labor" option is highlighted with a blue border.

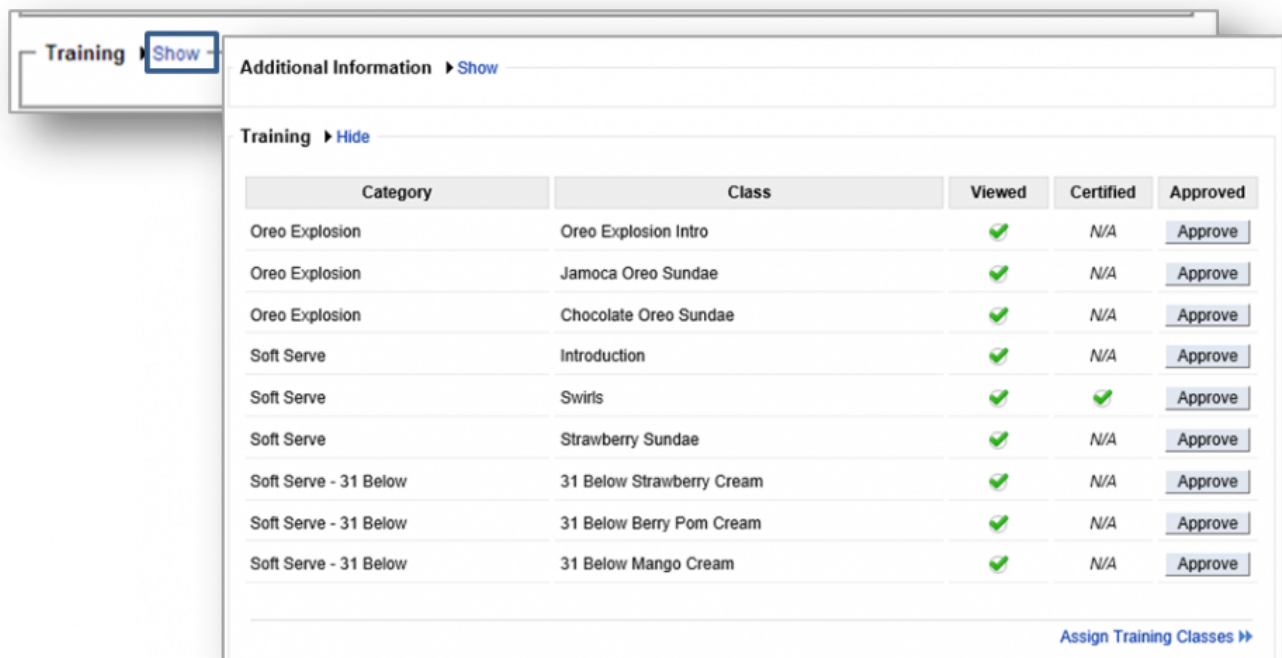
STEP 2: From the Labor Management screen, click ***Employees***.



STEP 3: Select the employee you wish to view training information for.



STEP 4: Click **Show** to the right of **Training** to view progress on any classes that have been assigned to him/her.

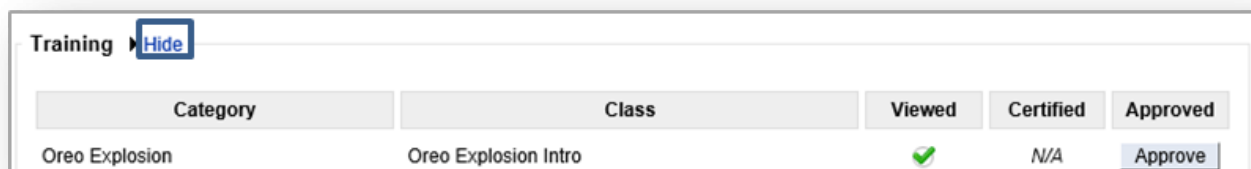


The screenshot shows a user interface with a 'Training' tab and a 'Show' button. Below the tab, there is a section titled 'Additional Information' with a 'Show' button. The main content area is titled 'Training' with a 'Hide' button. It contains a table with the following data:

Category	Class	Viewed	Certified	Approved
Oreo Explosion	Oreo Explosion Intro	✓	N/A	Approve
Oreo Explosion	Jamoca Oreo Sundae	✓	N/A	Approve
Oreo Explosion	Chocolate Oreo Sundae	✓	N/A	Approve
Soft Serve	Introduction	✓	N/A	Approve
Soft Serve	Swirls	✓	✓	Approve
Soft Serve	Strawberry Sundae	✓	N/A	Approve
Soft Serve - 31 Below	31 Below Strawberry Cream	✓	N/A	Approve
Soft Serve - 31 Below	31 Below Berry Pom Cream	✓	N/A	Approve
Soft Serve - 31 Below	31 Below Mango Cream	✓	N/A	Approve

At the bottom right of the table, there is a link: [Assign Training Classes >>](#)

STEP 5: Click **Hide** to the right of **Training**, once you have completed viewing the information to collapse the expanded view.



The screenshot shows the same user interface as before, but the 'Training' section is now collapsed. The 'Hide' button is visible next to the 'Training' tab. The table shows only the first row of data:

Category	Class	Viewed	Certified	Approved
Oreo Explosion	Oreo Explosion Intro	✓	N/A	Approve

How to Assign Multiple Training Videos & Certification Tests to an Employee

STEP 1: Click **Assign Training Classes** at the lower right corner of the screen.

Additional Information ▶ [Show](#)

Training ▶ [Hide](#)

Category	Class	Viewed	Certified	Approved
Oreo Explosion	Oreo Explosion Intro	✓	N/A	Approve
Oreo Explosion	Jamoca Oreo Sundae	✓	N/A	Approve
Oreo Explosion	Chocolate Oreo Sundae	✓	N/A	Approve
Soft Serve	Introduction	✓	N/A	Approve
Soft Serve	Swirls	✓	✓	Approve
Soft Serve	Strawberry Sundae	✓	N/A	Approve
Soft Serve - 31 Below	31 Below Strawberry Cream	✓	N/A	Approve
Soft Serve - 31 Below	31 Below Berry Pom Cream	✓	N/A	Approve
Soft Serve - 31 Below	31 Below Mango Cream	✓	N/A	Approve

[Assign Training Classes](#) ▶▶

STEP 2: Select those classes you wish to assign and click **Save**.

Assign Training: *Steven Kim*

[Go Back](#)

Category: Oreo Explosion

	Class
<input type="checkbox"/>	Oreo Explosion Intro
<input type="checkbox"/>	Oreo Sundae
<input checked="" type="checkbox"/>	Jamoca Oreo Sundae
<input checked="" type="checkbox"/>	Chocolate Oreo Sundae
<input type="checkbox"/>	Jamoca Oreo Blast
<input type="checkbox"/>	Peach Fruit Blast
<input type="checkbox"/>	Oreo Cake
<input type="checkbox"/>	Dipped Oreo Cookies

Category: Soft Serve

	Class
<input type="checkbox"/>	Introduction
<input checked="" type="checkbox"/>	Swirls
<input type="checkbox"/>	Strawberry Sundae
<input type="checkbox"/>	Opening Procedure
<input type="checkbox"/>	Daily Maintenance

Save

Cancel

How to Approve Completion of Assigned Training Videos & Certification Tests

STEP 1: Click **Approve** to the right of the applicable class.

Additional Information ▶ [Show](#)

Training ▶ [Hide](#)

Category	Class	Viewed	Certified	Approved
Oreo Explosion	Oreo Explosion Intro	✓	N/A	Approve
Oreo Explosion	Jamoca Oreo Sundae	✓	N/A	Approve
Oreo Explosion	Chocolate Oreo Sundae	✓	N/A	Approve
Soft Serve	Introduction	✓	N/A	Approve
Soft Serve	Swirls	✓	✓	Approve
Soft Serve	Strawberry Sundae	✓	N/A	Approve
Soft Serve - 31 Below	31 Below Strawberry Cream	✓	N/A	Approve
Soft Serve - 31 Below	31 Below Berry Pom Cream	✓	N/A	Approve
Soft Serve - 31 Below	31 Below Mango Cream	✓	N/A	Approve

[Assign Training Classes](#) ➔

STEP 2: Click **OK** when asked if you are sure you want to approve the training class.

Training ▶ Hide

Category	Class	Viewed	Certified	Approved
Oreo Explosion			N/A	Approve
Oreo Explosion			N/A	Approve
Oreo Explosion			N/A	Approve
Soft Serve			N/A	Approve
Soft Serve			✓	Approve
Soft Serve			N/A	Approve
Soft Serve - 31 Below	31 Below Strawberry Cream	✓	N/A	Approve
Soft Serve - 31 Below	31 Below Berry Pom Cream	✓	N/A	Approve
Soft Serve - 31 Below	31 Below Mango Cream	✓	N/A	Approve

[Assign Training Classes ▶▶](#)

Message from webpage

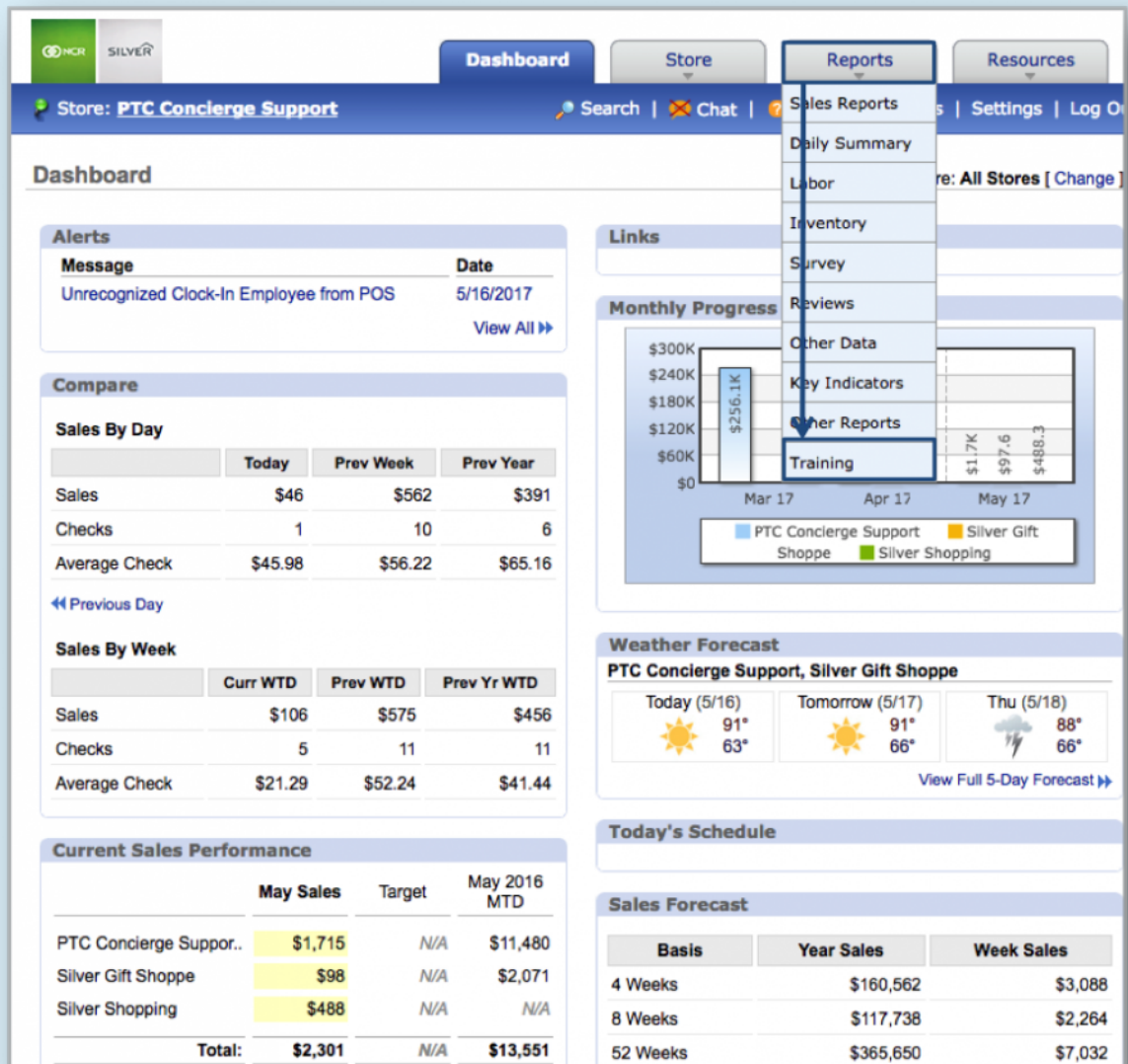
Are you sure you want to approve this training class?

[OK](#) [Cancel](#)

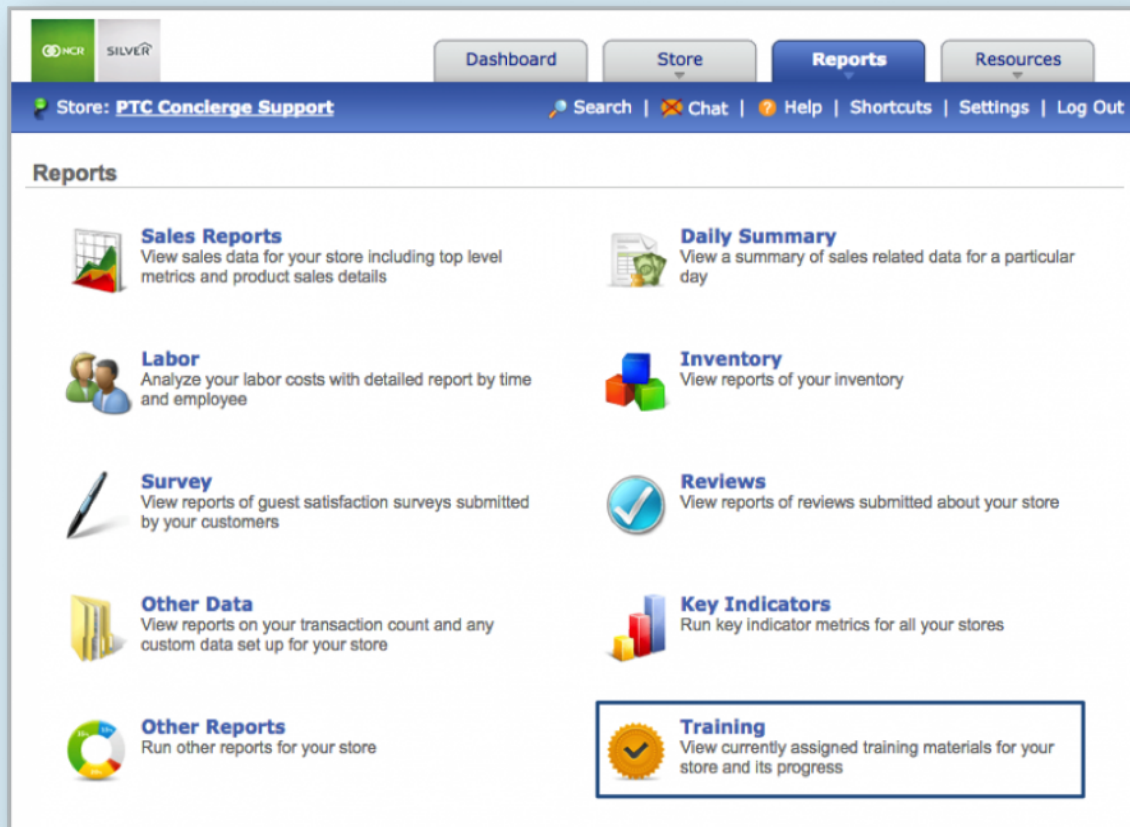
Once you approve a class, it will automatically update the employee file.

Additional Information ▶ Show				
Training ▶ Hide				
Category	Class	Viewed	Certified	Approved
Oreo Explosion	Oreo Explosion Intro	✓	N/A	Approve
Oreo Explosion	Jamoca Oreo Sundae	✓	N/A	Approve
Oreo Explosion	Chocolate Oreo Sundae	✓	N/A	Approve
Soft Serve	Introduction	✓	N/A	Approve
Soft Serve	Swirls	✓	✓	✓
Soft Serve	Strawberry Sundae	✓	N/A	Approve
Soft Serve - 31 Below	31 Below Strawberry Cream	✓	N/A	Approve
Soft Serve - 31 Below	31 Below Berry Pom Cream	✓	N/A	Approve
Soft Serve - 31 Below	31 Below Mango Cream	✓	N/A	Approve
Assign Training Classes ▶▶				

✿ **Reporting Feature!** To view the progress of all assigned classes, mouse over the **Reports** tab and click **Training**.



Hint: You can also access the Training Report by clicking on the **Reports** tab and then on **Training** from the Reports screen.



The following report will provide you with an overview of all classes assigned to your team

and their progress in completing those assignments.

Training				Go Back
Class	Assigned	Completed	Percent	
Crew Member Training > Soft Serve				
Swirls	1	1	100.0%	
Crew Member Training > Soft Serve - 31 Below				
31 Below Strawberry Cream	1	0	0.0%	
31 Below Berry Pom Cream	1	0	0.0%	
31 Below Mango Cream	1	0	0.0%	
Promotions > Oreo Explosion				
Oreo Explosion Intro	1	1	100.0%	
Oreo Sundae	1	0	0.0%	
Jamoca Oreo Sundae	1	0	0.0%	
Chocolate Oreo Sundae	1	0	0.0%	

Related Topics:

[How Employees Access Training](#)

Employee Access

The purpose of this section is to illustrate how an employee can access assigned training videos and certification tests.

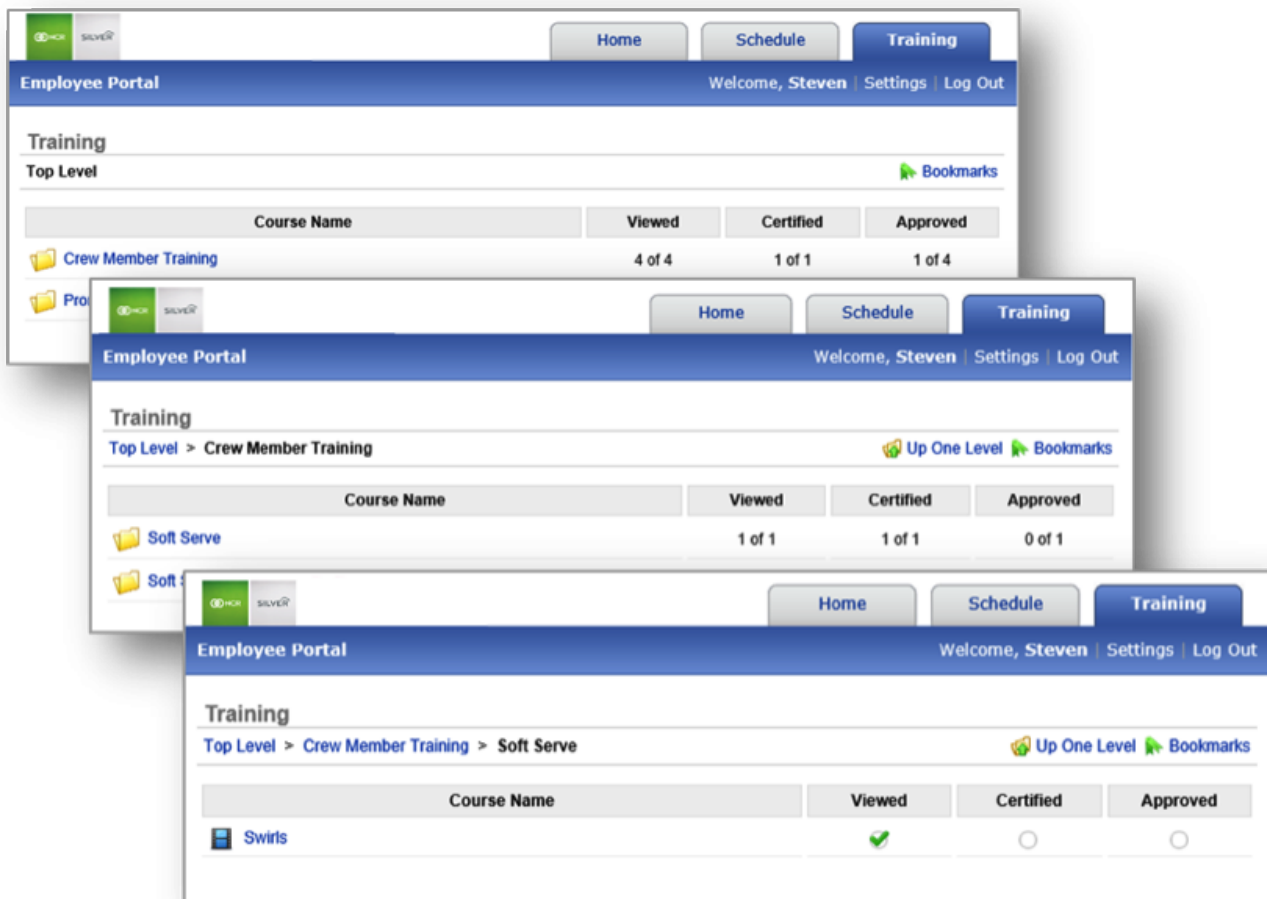
How to Access Training Videos & Certification Tests

STEP 1: From the Dashboard view, mouse over the **Training** tab and click it. You can also click **View All Training Materials** located to the bottom right of the *Training Alerts* box on your dashboard.

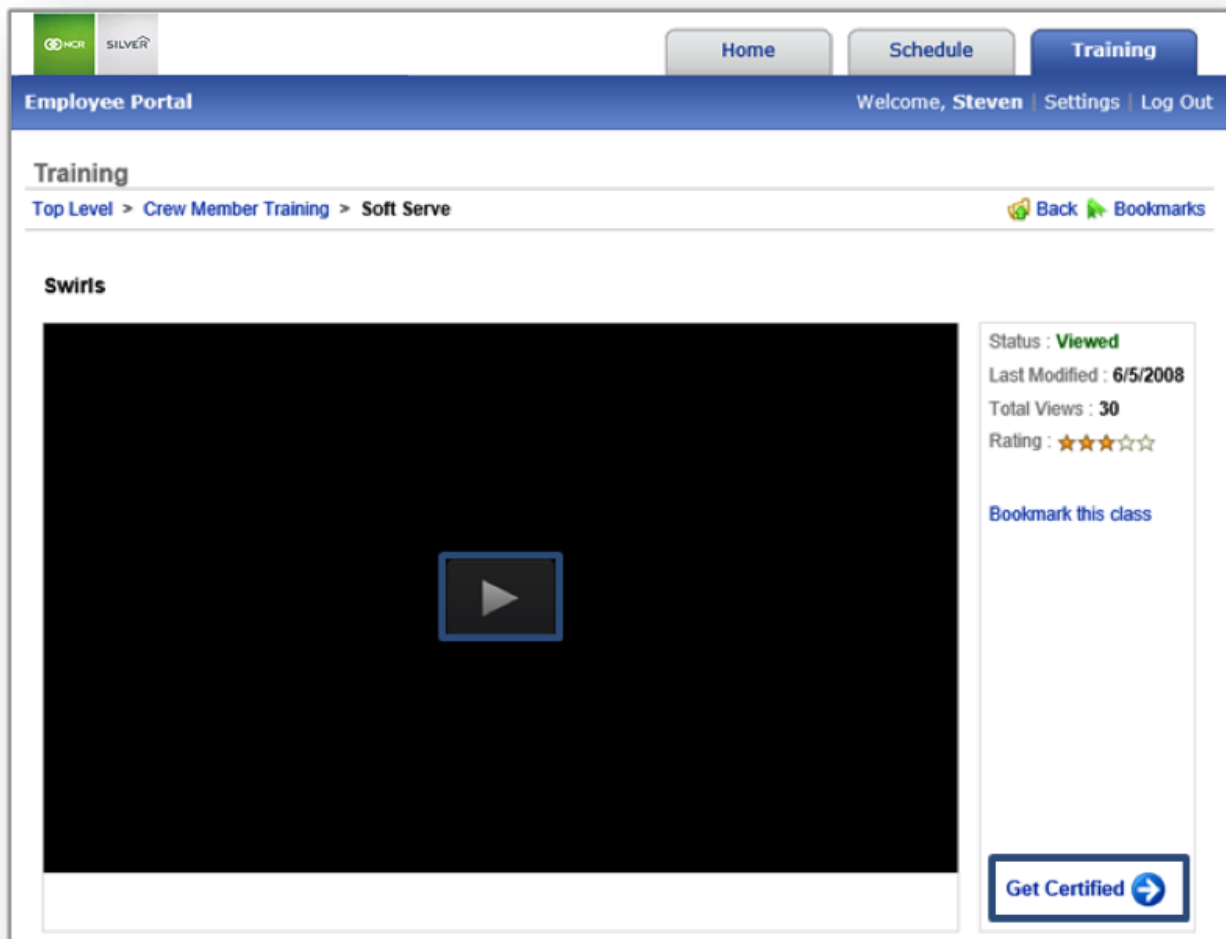
The screenshot shows the Employee Portal interface. At the top, there are tabs for Home, Schedule, and Training, with Training being the active tab. Below the tabs, a blue header bar displays 'Employee Portal' on the left and 'Welcome, Steven | Settings | Log Out' on the right. The main content area is divided into several sections:

- Alert**: A section with a table showing messages. The table has columns 'Messages' and 'Date'. It currently displays 'No Message'.
- Contact**: A section with a link to 'Contact Manager'.
- Training**: A section with a table showing training courses. The table has columns 'Course Name' and 'Classes Completed'. It lists 'Crew Member Training' (1 of 4) and 'Promotions' (0 of 2). A button 'View all training material' is located at the bottom right of this section.
- Upcoming Schedule**: A section with a link 'View full schedule'.
- Time Card**: A section with a table showing hours worked. The table has columns 'Week Of' and 'Total Hours'. It lists two weeks: '8/17/2014' (0.00) and '8/24/2014' (0.00).

STEP 2: Click the folder for the class that has been assigned to you. Keep in mind, you may be assigned multiple classes, each of which may contain multiple videos and/or certification tests.



STEP 3: After you have viewed the necessary training materials and/or videos, click **Get Certified** to begin the test.



STEP 4: Click **Submit Answers** to complete the test. A message will pop up to notify you of your completion status.



The screenshot shows the 'Employee Portal' interface. At the top, there are navigation tabs for 'Home', 'Schedule', and 'Training'. The 'Training' tab is active. Below the navigation bar, the page title is 'Employee Portal' and the user is logged in as 'Steven'. The main content area is titled 'Training' and shows a breadcrumb trail: 'Top Level > Crew Member Training > Soft Serve'. A 'Back' button is visible. The instructions state: 'Please answer the following questions based on the "Swirls" training. You must answer the questions correctly to be certified for this class.' There are two questions: '1. How many ounces are in a regular size Soft Serve?' and '2. How many ounces are in a large size Soft Serve?'. Each question has four radio button options. A 'Submit Answers' button is located at the bottom right of the form.

Employee Portal

Welcome, Steven | Settings | Log Out

Training

Top Level > Crew Member Training > Soft Serve [Back](#)

Please answer the following questions based on the "Swirls" training.
You must answer the questions correctly to be certified for this class.

1. How many ounces are in a regular size Soft Serve?

☐ 4 ounces
☐ 6 ounces
☐ 8 ounces
☐ 10 ounces

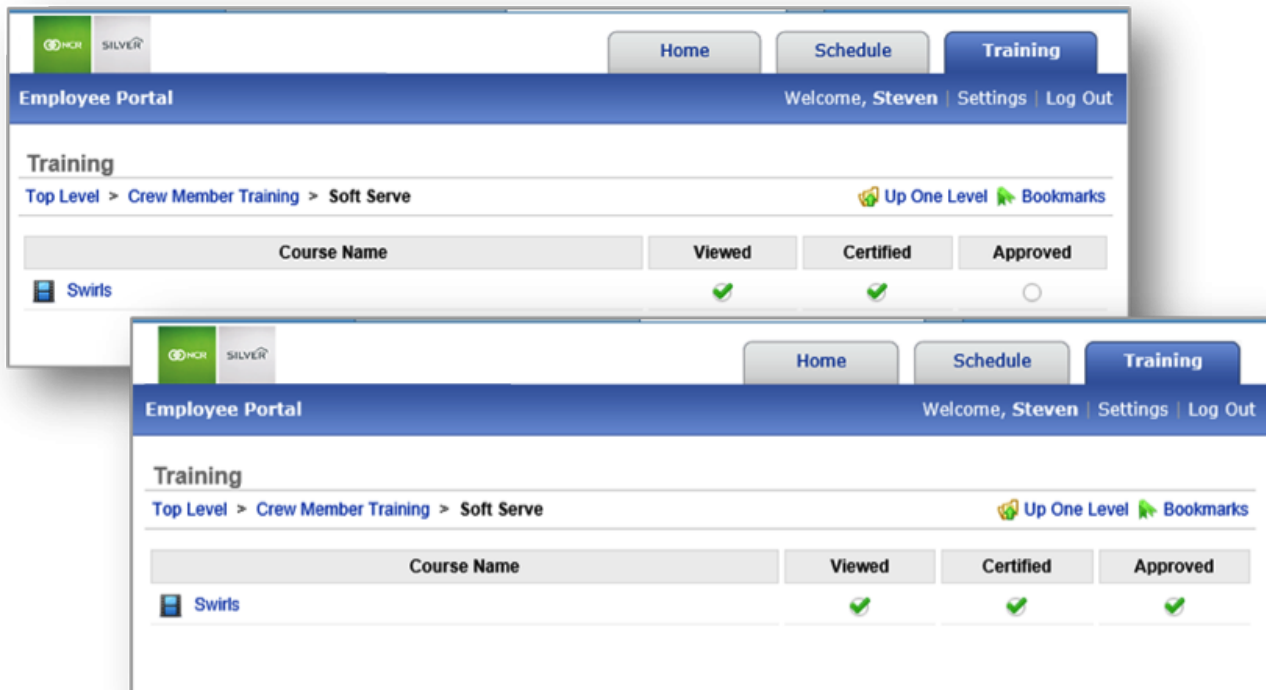
2. How many ounces are in a large size Soft Serve?

☐ 5 ounces
☐ 7 ounces
☐ 9 ounces
☐ 11 ounces

[Submit Answers](#)

Once you have completed a class, it will be automatically reflected in your employee file. At this time, your supervising manager will review your progress to approve completion. Upon submitting approval, your

employee file will be updated to reflect this change.



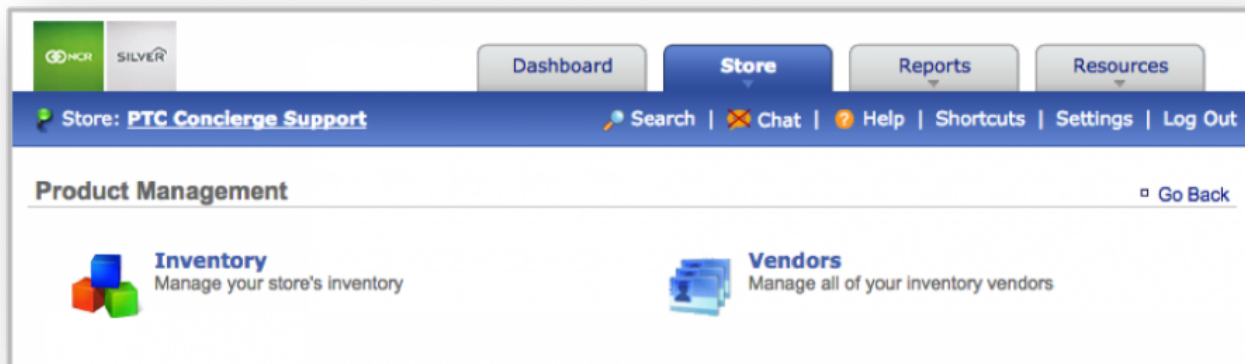
Related Topics:

[How to Assign Training Videos & Certification Tests](#)

Inventory Management

Effective inventory management can help to reduce cost of goods (COGs) by quickly managing your inventory through the NCR Console platform.

! **Important:** If you are entering inventory for the very first time, you must **ADD Inventory** for all items you have on hand. Do **NOT Take Inventory** first. Adding inventory first **STARTS** your inventory.



In this section you will find the following resources:

General

Add Inventory: How to add inventory.

Take Inventory: How to take inventory (raw ingredients/goods) to Console.

How to Hide or Display Items: How to hide or display inventory items.

Manage Products

Manage Inventory: How to manage your inventory in the system.

How to Select a Unit of Measure: How to select and create a unit of measure.

Correcting Errors: How to correct errors after you've added or taken inventory.

How to Export Inventory: How to export your inventory database.

GLOSSARY OF TERMS

- **Add Inventory:** Occurs when you receive an order.
- **Take Inventory:** When you take the inventory of what you have *on hand* the day you take inventory (*which may include recent deliveries*).
- **On Hand:** A snapshot of what you currently have in inventory.
- **Theoretical On Hand:** Uses POS and *Actual* data to determine what you should currently have in inventory. Inventory items must be tied to the POS to determine *Theoretical On Hand* totals.
- **Auto Depletion:** When an item that correlates to a recipe is rung up on the POS, that item will auto-deplete from inventory to give you what you should *actually* have on hand. *Note: the item must be part of a recipe that is also tied to the POS.*
- **Actual Inventory:** Reconciles with Auto Depletion to determine what you have on hand. This occurs when you take inventory.
- **View History:** Provides you with historical data to show how Theoretical On Hand totals were calculated.
- **Cost of Goods (COGs):** The value of goods sold during a particular period of time.
- **Inventory Discrepancy:** Depicts actual vs. ideal inventory.

Add Inventory

In this module, you will learn:

- How to add inventory (raw ingredients/goods) to Console

Adding Inventory

To add inventory you will need to navigate to the **Product Management** module and click **Inventory**.

The screenshot displays the NCR Silver dashboard for a store named "PTC Concierge Support". The top navigation bar includes "Dashboard", "Store", "Reports", and "Resources". The "Store" dropdown menu is open, showing options: "Day-to-Day", "Labor", "Planning", and "Product". The "Product" option is highlighted with a green box. A green arrow points from this box to the "Product Management" section below. In the "Product Management" section, the "Inventory" module is highlighted with a green box. The "Inventory" module is represented by a cube icon and the text "Inventory Manage your store's inventory".

Dashboard

Store: [PTC Concierge Support](#)

Alerts

Message	Date
Unavailability Received	3/29/2016

[View All](#)

Current

Sales By Day

Today Prev Week Prev Year

Monthly Progress

Filter by Store: [All Stores](#) [Change](#)

Monthly Progress Chart:

Month	Progress
May 16	\$45.8K
Jun 16	\$52.8K
Jul 16	\$1.7K

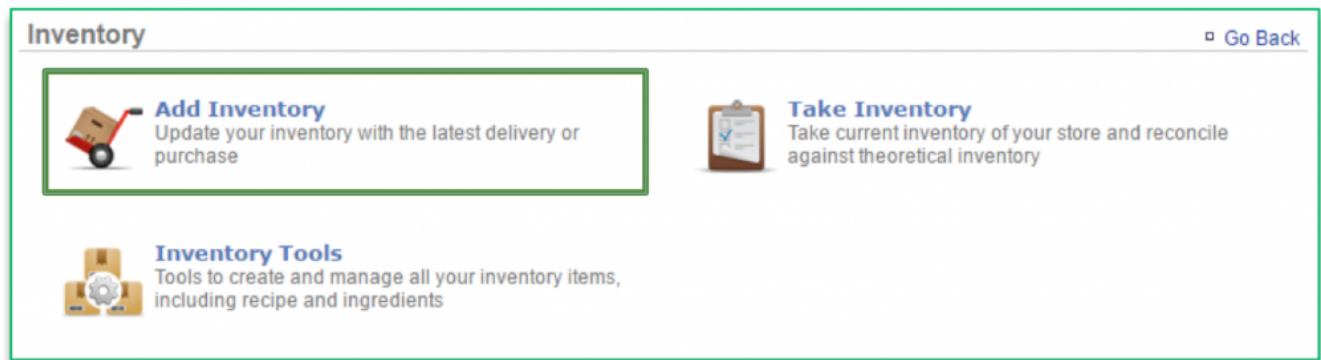
Product Management

[Go Back](#)

Inventory
Manage your store's inventory

To Add Inventory

1. Click **Add Inventory**







2. Click the calendar icon to the right of **As of** to select the date and enter the time of the delivery
 - a. It's important the date you enter reflects the date that you **actually received the delivery** of ingredients/goods (even if it is not the date that you are adding inventory to the system)
 - b. Inventory should always be entered in the sequence of events it occurred
3. Enter quantity of all items received
4. Select the unit size of each item received
5. Adjust the unit cost for each item received
 - a. The unit cost should always reflect the unit size that is shown
 - i. For example, if one case containing 100 gadgets costs \$100, each gadget costs \$1. The unit size for a case should be **Case** and the **Unit Cost** should be \$100. However, if you change the unit size to Each the unit cost should be changed to \$1 so that the totals correctly calculate costs.

6. Click **Next**

Add Inventory

[Go Back](#)
[More Options](#)

As of: 8/8/2016  1  28  AM 

Category : Beverage

	Item	Min Qty	Max Qty	Quantity	Units	Unit Cost
Hide	Coffee Regular Gold			+/- <input type="text"/>	Case 64ct (cs) ▼	<input type="text" value="50.00"/>
Hide	Freestyle Diet Sweetener			+/- <input type="text"/>	Container 2.5gal (cntr) ▼	<input type="text" value="80.25"/>
Hide	Freestyle Sweetener			+/- <input type="text"/>	Container 5gal (cntr) ▼	<input type="text" value="19.51"/>
Hide	Syrup Fruit Punch (3gal)			+/- <input type="text"/>	Container 3gal (cntr) ▼	<input type="text" value="41.85"/>
Hide	Syrup Fruit Punch (5gal)			+/- <input type="text"/>	Container 5gal (cntr) ▼	<input type="text" value="67.45"/>
Hide	Syrup Lemonade Pink BIB			+/- <input type="text"/>	BIB 3gal (bib) ▼	<input type="text" value="41.85"/>
Hide	Syrup Mountain Dew			+/- <input type="text"/>	BIB 5gal (bib) ▼	<input type="text" value="67.45"/>
Hide	Syrup Mountain Dew Diet			+/- <input type="text"/>	BIB 3gal (bib) ▼	<input type="text" value="41.85"/>

Category : Test Items

	Item	Min Qty	Max Qty	Quantity	Units	Unit Cost
Hide	Bun Hamburger GF Clssc 3.2oz			+/- <input type="text"/>	Case 24ct (cs) ▼	<input type="text" value="23.60"/>
Hide	Mushroom Slicd Thin 1/4in			+/- <input type="text"/>	Container 10lb (cntr) ▼	<input type="text" value="19.66"/>

[Next >>](#)
[Cancel](#)

7. A summary of your add will be reflected in a floating window

8. Click **Finalize**

Add Inventory Summary

Effective Date: 8/8/2016 1:28 AM

Total Items: 7

Invoice Total: \$761.06

FinalizeCancel

Related Topics:

[Correct an Inventory Add](#)

[Take Inventory](#)

[How to Hide or Display Items](#)

[Manage Inventory](#)

[How to Add a Custom a Unit of Measure](#)

[How to Export Inventory:](#) How to export your inventory database.

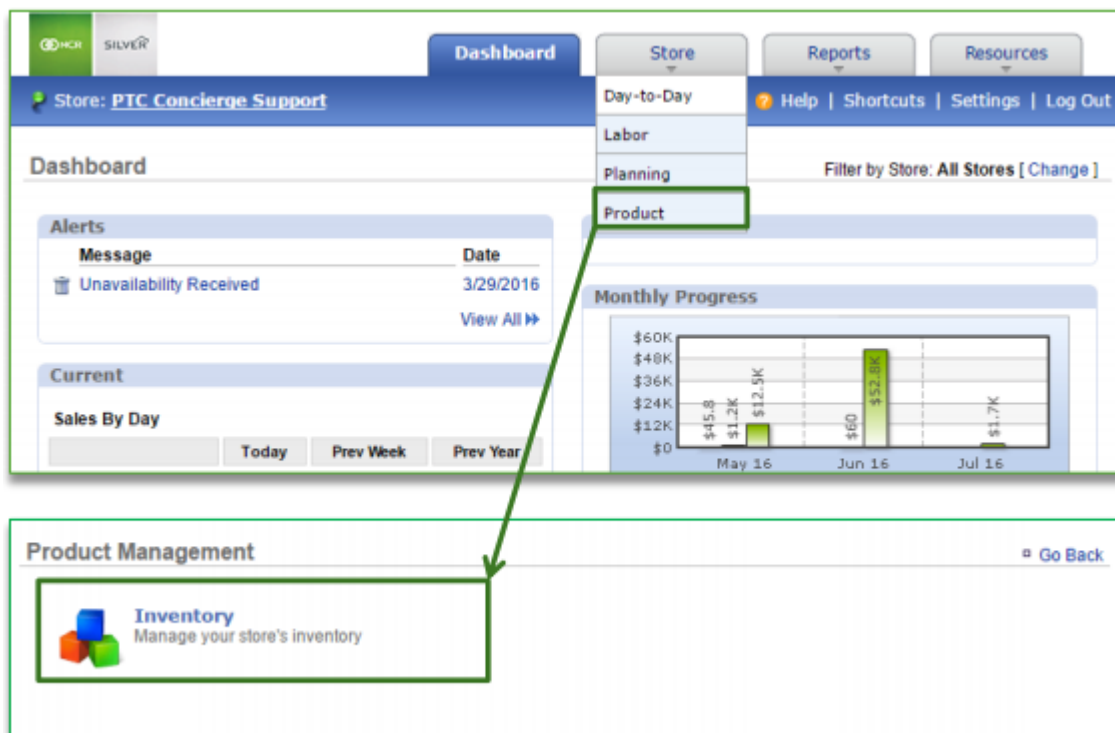
Import Invoices

In this module, you will learn:

- How to import vendor invoices to Add Inventory via the Store side portal.

Importing Invoices

The ability to import invoices allows you add items received from vendors into your inventory in bulk with formatted Excel files. To import invoices you will need to navigate to the **Product Management** module and click **Inventory**.



To Upload Invoices

1. Click **Add Inventory**

Inventory

Go Back

Add Inventory
Update your inventory with the latest delivery or purchase

Take Inventory
Take current inventory of your store and reconcile against theoretical inventory

Inventory Tools
Tools to create and manage all your inventory items, including recipe and ingredients

1. Click **More Options**
2. Click **Import Invoice**

Add Inventory

Go Back

More Options

As of: 6/21/2016 10:18 AM

Category: BAR

	Item	Min Qty	Max Qty	Quantity	Units	Unit Cost
Hide	1235			+/-	Select a unit	
Hide	Beer (single)			+/-	Select a unit	
Hide	BudLight			+/-	Select a unit	
Hide	Long Island			+/-	Select a unit	
Hide	shot			+/-	Select a unit	

1. Click **here** to download the formatted template.

Import Invoice

Go Back

Format: Microsoft Excel

Choose File No File Chosen

Click here to view a sample

Upload Cancel

Upload status :

Important reminders about the format of your invoice

1. You **MUST** have SKU numbers set up in Console for each ingredient listed within your invoice
2. Those SKU numbers **MUST** match the SKU numbers listed within your invoice
3. Quantity field **MUST** include the quantity

4. Quantity field **CANNOT** include non-numerical values

	A	B	C	D	E	F	G	H	I
1	SKU	Qty	Unit	Product Description	Product Notes	Unit Cost	Total		
2	305854	1	Case	Coffee Decaf Gold		39.16	39.16		
3	81123	1	Case	Coffee Regular Gold		50	50		
4	81416	2	Container	Freestyle Diet Sweetener		80.25	160.5		
5									
6									
7									
8									
9									
10									
11									
12									
13									
14									
15									

1. Click **Choose File** to select the invoice you wish to upload
2. Click **Upload**

Import Invoice Go Back

Format: Microsoft Excel

Choose File No File Chosen


[Click here to view a sample](#)

Upload **Cancel**

Upload status :

1. You will be redirected to the **Add Inventory** page
 - a. This page will be populated with the totals from your imported invoice provided they meet the required format criteria noted above
 - i. Those items that do not meet the required criteria will not be imported to show totals
 - b. From here you can made additional changes to any of the editable fields, including the date and time
 - c. Ensure that the **“As of”** date reflects the date on the invoice
 - d. If the **Units** defined in the import file are not an exact match to what is set up in Console, then the largest unit of measure will be populated on the page

2. Click **Next** at the bottom of the page

Add Inventory  [Go Back](#) [More Options](#)

As of: 10/28/2016 9:29 AM

Category: Beverage

	Item	Min Qty	Max Qty	Quantity	Units	Unit Cost
Hide	Coffee Decaf Gold	50 Each	250 Each	+/- 1	Case 64ct (cs) ▼	39.16
Hide	Coffee Regular Gold	50 Each	250 Each	+/- 1	Case 64ct (cs) ▼	50
Hide	Freestyle Diet Sweetener	2 cntr	5 cntr	+/- 2	Container 2.5gal (cntr) ▼	80.25
Hide	Syrup Fruit Punch (3gal)	1 cntr	5 cntr	+/-	Container 3gal (cntr) ▼	41.85
Hide	Syrup Fruit Punch (5gal)			+/-	Container 5gal (cntr) ▼	67.45
Hide	Syrup Lemonade Pink BIB			+/-	BIB 3gal (bib) ▼	41.85
Hide	Syrup Mountain Dew			+/-	BIB 5gal (bib) ▼	67.45
Hide	Syrup Mountain Dew Diet			+/-	BIB 3gal (bib) ▼	41.85

Category: Test Items

	Item	Min Qty	Max Qty	Quantity	Units	Unit Cost
Hide	Bun Hamburger GF Clssc 3.2oz			+/-	Case 24ct (cs) ▼	23.60
Hide	Mushroom Slicd Thin 1/4in			+/-	Container 10lb (cntr) ▼	19.66

[Next >>](#) [Cancel](#)

1. A summary of your Add will appear in a pop-up window
2. Click **Finalize**

Add Inventory Summary

Effective Date: 10/28/2016 9:29 AM

Total Items: 3

Invoice Total: \$249.66

[Finalize](#) [Cancel](#)

Note: To ensure that the SKU numbers on your invoice match the SKU numbers in the application, click **More Options** and **Download SKU List**. This will generate a file that allows you to compare what you have set up for each item to the SKU listed on your invoice.

Add Inventory ⓘ

As of: 6/21/2016 [Calendar Icon] 10:18 AM

Category: BAR

Go Back More Options

Display Options
Download SKU List
Import Invoice
View History

	Item	Min Qty	Max Qty	Quantity	Units	Unit Cost
Hide	1235			+/-	Select a unit	
Hide	Beer (single)			+/-	Select a unit	
Hide	BudLight			+/-	Select a unit	
Hide	Long Island			+/-	Select a unit	
Hide	shot			+/-	Select a unit	

ItemSKUList - Microsoft Excel

Item SKU	Item Name
305854	Coffee Decaf Gold
81123	Coffee Regular Gold
81416	Freestyle Diet Sweetener
	Syrup Fruit Punch (3gal)
	Syrup Fruit Punch (5gal)
	Syrup Lemonade Pink BIB
	Syrup Mountain Dew
	Syrup Mountain Dew Diet
	Syrup Mug Root Beer (3gal)
	Syrup Mug Root Beer (5gal)
	Syrup Pepsi
	Syrup Pepsi Diet
	Syrup Pink Lemonade
	Syrup Raspberry Tea

- [Click here to see the full details](#)

Correcting an Inventory Add

In this module, you will learn:

- How to correct an inventory add (for raw ingredients/goods) within Console

Correcting Inventory Adds

To correct an inventory add you will need to navigate to the **Product Management** module and click **Inventory**.

The screenshot displays the NCR Silver console interface. At the top, there is a navigation bar with tabs for **Dashboard**, **Store**, **Reports**, and **Resources**. The **Store** dropdown menu is open, showing options: **Day-to-Day**, **Labor**, **Planning**, and **Product**. The **Product** option is highlighted with a green box. A green arrow points from this box to the **Product Management** module below. The **Product Management** module contains a section for **Inventory**, which is also highlighted with a green box. The **Inventory** section includes a sub-header "Manage your store's inventory".

Dashboard

Store: **PTC Concierge Support**

Alerts

Message	Date
Unavailability Received	3/29/2016

View All >>

Current

Sales By Day

Today Prev Week Prev Year

Monthly Progress

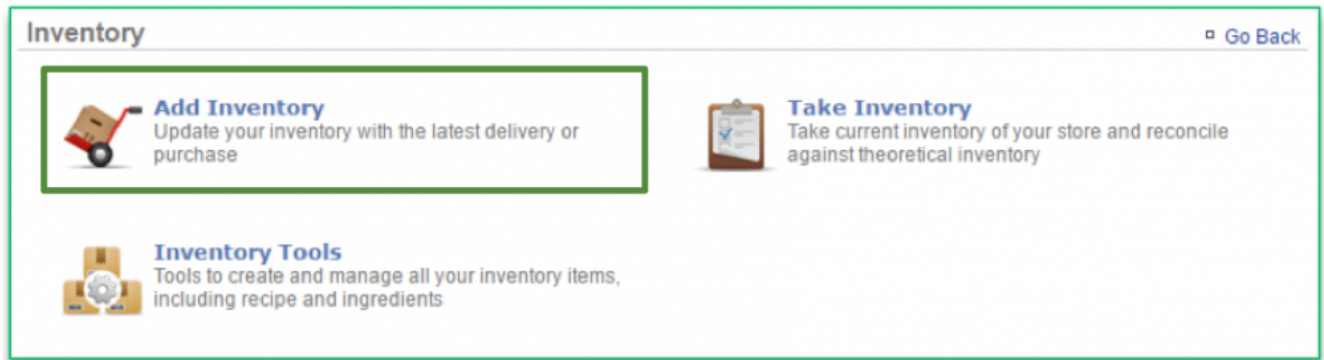
Filter by Store: All Stores [Change]

Product Management

Go Back

Inventory
Manage your store's inventory

To Correct an Inventory Add

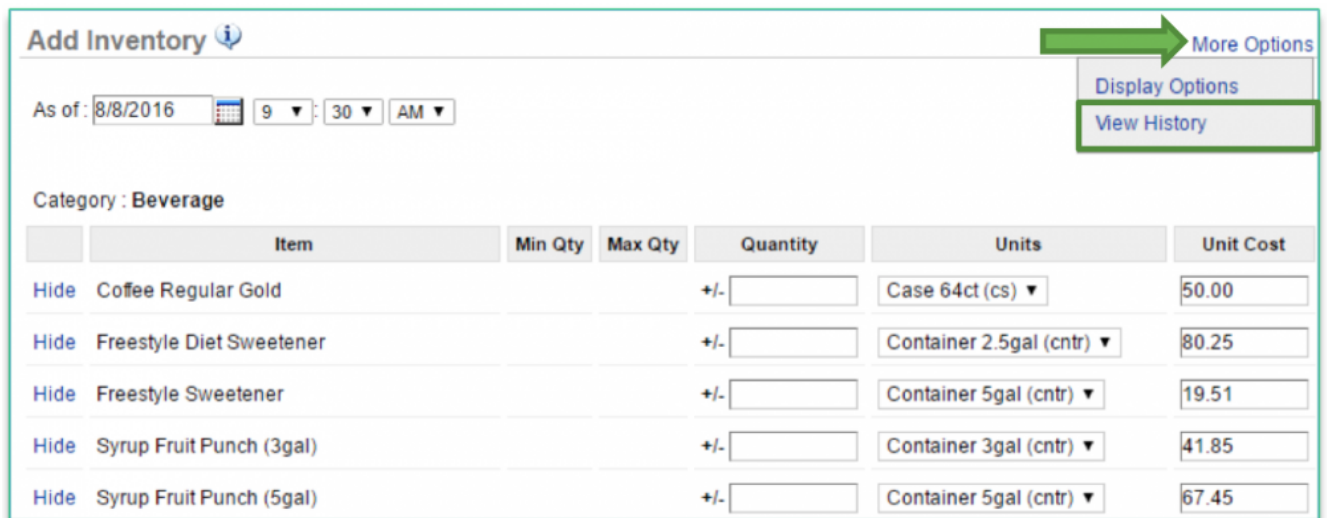
1. Click **Add Inventory**


Inventory [Go Back](#)

Add Inventory
Update your inventory with the latest delivery or purchase

Take Inventory
Take current inventory of your store and reconcile against theoretical inventory

Inventory Tools
Tools to create and manage all your inventory items, including recipe and ingredients

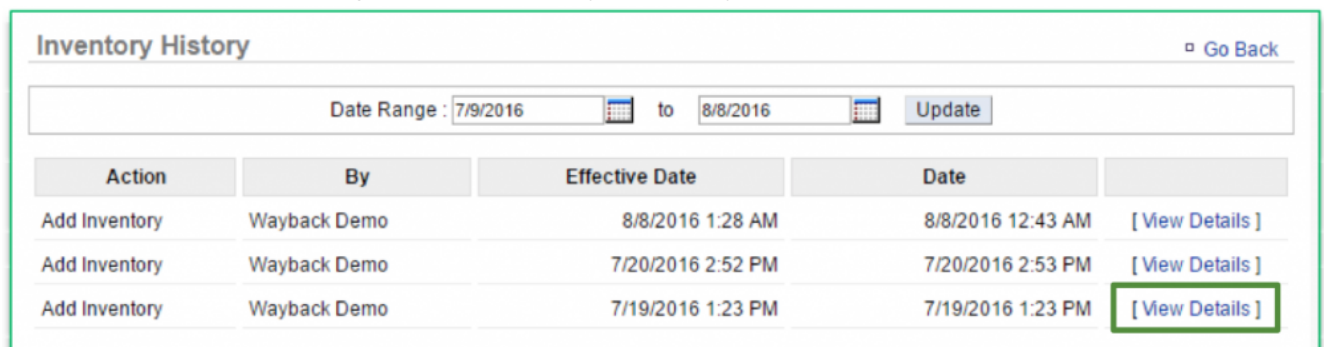
2. Click **More Options**3. Click **View History**


Add Inventory [More Options](#)

As of: 8/8/2016 9:30 AM

Category: Beverage

	Item	Min Qty	Max Qty	Quantity	Units	Unit Cost
Hide	Coffee Regular Gold			+/-	Case 64ct (cs) ▼	50.00
Hide	Freestyle Diet Sweetener			+/-	Container 2.5gal (cntr) ▼	80.25
Hide	Freestyle Sweetener			+/-	Container 5gal (cntr) ▼	19.51
Hide	Syrup Fruit Punch (3gal)			+/-	Container 3gal (cntr) ▼	41.85
Hide	Syrup Fruit Punch (5gal)			+/-	Container 5gal (cntr) ▼	67.45

4. Click **View Details** to the right of the inventory add that you wish to make corrections to


Inventory History [Go Back](#)

Date Range: 7/9/2016 to 8/8/2016 [Update](#)

Action	By	Effective Date	Date	
Add Inventory	Wayback Demo	8/8/2016 1:28 AM	8/8/2016 12:43 AM	[View Details]
Add Inventory	Wayback Demo	7/20/2016 2:52 PM	7/20/2016 2:53 PM	[View Details]
Add Inventory	Wayback Demo	7/19/2016 1:23 PM	7/19/2016 1:23 PM	[View Details]

5. Click **Edit** or **Delete** to right of the item you need to correct

History Details

[Go Back](#)

Action: **Add Inventory**
Effective Date: **7/19/2016 1:23 PM**
Date Submitted: **7/19/2016 1:23 PM**
User: **Wayback Demo**

Category : **Freezer**

Item	Quantity	Unit Cost	
Bacon Pre Ckd Reg Slcd 300ct	5 cs	\$25.29	[Edit] [Delete]
Chili Beef No Beans	5 cs	\$47.04	[Edit] [Delete]
Chix Brst Fil B/S Mar Even Ck	5 cs	\$32.37	[Edit] [Delete]
Chix Filet Brd Ital Ckd	5 cs	\$33.19	[Edit] [Delete]

- a. For edits
- Adjust the quantity and/or price

- ii. Click **Save**

Edit Inventory
Go Back

Action: Add Inventory
Effective Date: 7/19/2016 1:23 PM
Date Submitted: 7/19/2016 1:23 PM
User: Wayback Demo

Category: Freezer

Item	Quantity	Units	Unit Cost
Bacon Pre Ckd Reg Sldc 300ct	6	Case 2-150ct (cs)	25.29

Save Cancel



IMPORTANT REMINDERS ABOUT ADDING OR CORRECTING INVENTORY

The default UNIT shown (typically a case size) will always reflect the *largest unit of measure* for that item. The **UNIT COST** is always associated on the largest unit of measure for that item. If you change the **UNIT**, you must also change the **UNIT COST**.

For example:

Item	Units	Unit Cost
Item A	Case (10 packs of 100)	Unit Cost: \$100 <i>per case</i>
	Pack of 100	Unit Cost: \$10 <i>per pack</i>
	Each	Unit Cost: \$0.10 <i>per item</i>

When Adding Inventory, use the invoice you received with your order as your point of reference. Enter the quantity and unit cost shown on the invoice for what you received. The invoice total should match the inventory total; excluding tax, shipping charges and/or items that are not part of the inventory shown on CimpleBox. Make sure your totals match before clicking Finalize.

- iii. You will be asked to confirm your choice. Click **OK**

store.cimplebox.com says:

Are you sure you want to make these changes?

OK Cancel

- b. For deletions

- i. Click **Delete** to the right of the item

History Details
Go Back

Action: **Add Inventory**
 Effective Date: 7/19/2016 1:23 PM
 Date Submitted: 7/19/2016 1:23 PM
 User: **Wayback Demo**

Category : **Freezer**

Item	Quantity	Unit Cost		
Bacon Pre Ckd Reg Slcd 300ct	5 cs	\$25.29	[Edit]	[Delete]
Chili Beef No Beans	5 cs	\$47.04	[Edit]	[Delete]
Chix Brst Fil B/S Mar Even Ck	5 cs	\$32.37	[Edit]	[Delete]
Chix Filet Brd Ital Ckd	5 cs	\$33.19	[Edit]	[Delete]

- ii. You will be asked to confirm your choice. Click **OK**

×

store.cimblebox.com says:

Are you sure you want to make these changes?

OK
Cancel

Related Topics:

[Add Inventory](#)

[Take Inventory](#)

[How to Hide or Display Items](#)

[Manage Inventory](#)

[How to Add a Custom a Unit of Measure](#)

[How to Export Inventory:](#) How to export your inventory database.

Take Inventory

In this module, you will learn:

- How to take inventory (raw ingredients/goods) to Console.

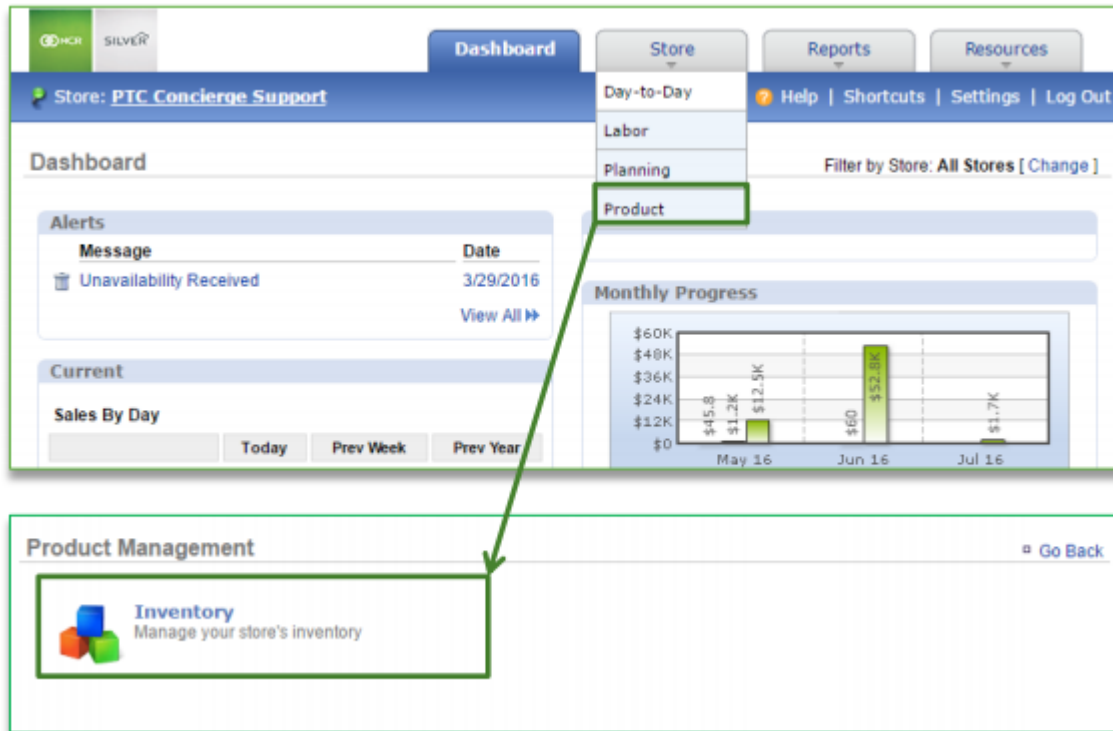
Taking Inventory

Take Inventory means taking inventory of what you have *on hand* the day you typically take inventory (*which may include recent deliveries*).

It can also be used to establish a starting inventory. If you are establishing your initial inventory for products you already have on hand, you must perform a “**Take**” to set your starting quantities. This will allow you to tell the system what you have on hand without skewing reporting costs.

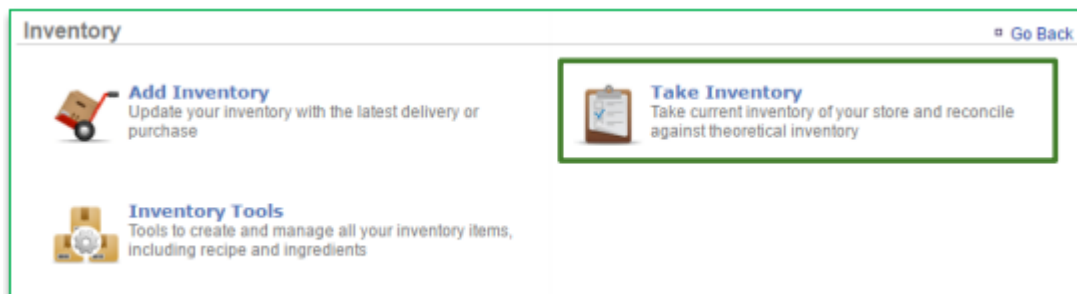
Note: If you are a new business with **NO** starting quantities, you will need to instead perform an “**Add Inventory**” as you receive order(s).

To take inventory you will need to navigate to the **Product Management** module and click **Inventory**.



To Take Inventory

1. Click **Take Inventory**



2. Click the calendar icon to the right of **As of** to select the date and enter the time you took inventory
 - a. It's important the date you enter reflects the date that you **actually took inventory** of ingredients/goods (even if it is not the date that you are entering the totals into the system)
 - b. Inventory should always be entered in the sequence of events it occurred
3. Enter quantity of all items received in the applicable fields
 - a. All units of measure that are set up for the items in your inventory will be shown so that you can take inventory off of multiple units of measure for the same item

4. Click **Submit**

Take Inventory Go Back More Options

As of: 8/8/2016 1:56 AM

Category : Beverage

	Item	Min Qty	Max Qty	Quantity	Quantity	Quantity	Quantity
Hide	Coffee Regular Gold			<input type="text"/> cs	<input type="text"/> Each		
Hide	Freestyle Diet Sweetener			<input type="text"/> cntr	<input type="text"/> gal		
Hide	Freestyle Sweetener			<input type="text"/> cntr	<input type="text"/> gal		
Hide	Syrup Fruit Punch (3gal)			<input type="text"/> cntr	<input type="text"/> gal		
Hide	Syrup Fruit Punch (5gal)			<input type="text"/> cntr	<input type="text"/> gal		
Hide	Syrup Lemonade Pink BIB			<input type="text"/> bib	<input type="text"/> gal		

Category : Test Items

	Item	Min Qty	Max Qty	Quantity	Quantity	Quantity	Quantity
Hide	Bun Hamburger GF Clssc 3.2oz			<input type="text"/> cs	<input type="text"/> Each		
Hide	Mushroom Sliced Thin 1/4in			<input type="text"/> cntr	<input type="text"/> lb		

Submit Cancel

5. You will be asked to confirm your choice. Click **OK**

store.cimlebox.com says:

You have taken inventory for the following date:

8/8/2016 1:56 AM

Do you want to continue?

OK Cancel

p(banner important). **Important:** If you are entering inventory for the very first time, you must **ADD Inventory** for all items you have on hand. Do **NOT Take Inventory** first. Adding inventory first **STARTS** your inventory.

6. A summary of your take will appear

- You can select a reason for the take of each item by clicking the dropdown menu to the right of the item (optional)

- b. **Important:** If you are establishing an initial inventory, you must select “**Initial Inventory**” in the dropdown menu. This will allow you to tell the system what you have on hand without skewing reporting costs.

7. Click **Submit**

Take Inventory

Go Back More Options

Category : Beverage

Item	Theoretical On Hand	Actual On Hand	Difference	Reason
Coffee Regular Gold	138.00 Each	64.00 Each	-74.00 Each	Select a reason ▼
Freestyle Diet Sweetener	3.00 cntr	1.40 cntr	-1.60 cntr	Select a reason ▼
Freestyle Sweetener	9.00 cntr	1.40 cntr	-7.60 cntr	Select a reason ▼
Syrup Fruit Punch (3gal)	10.00 cntr	1.00 cntr	-9.00 cntr	Select a reason ▼
Syrup Fruit Punch (5gal)	8.00 cntr	1.00 cntr	-7.00 cntr	Select a reason ▼

Category : Test Items

Item	Theoretical On Hand	Actual On Hand	Difference	Reason
Bun Hamburger GF Clssc 3.2oz	48.00 Each	24.00 Each	-24.00 Each	Select a reason ▼
Mushroom Slicd Thin 1/4in	2.00 cntr	1.00 cntr	-1.00 cntr	Select a reason ▼

Submit Cancel

8. You will be asked to confirm your choice. Click **OK**

store.cimplebox.com says:

Are you sure you want to continue?

OK Cancel

- [Click here to see the full details.](#)

Hide or Display Items

The purpose of this section is to illustrate how to hide or display items within Inventory. You can do this through the Adding, Taking or Managing of Inventory.

Hiding or Displaying Inventory

STEP 1: From your Dashboard view, mouse over the **Store** tab and click **Product**.

The screenshot shows the NCR Silver POS system dashboard. The top navigation bar includes 'Dashboard', 'Store', 'Reports', and 'Resources'. The 'Store' menu is open, showing options: 'Day-to-Day', 'Labor', 'Planning', and 'Product'. The 'Product' option is highlighted with a blue box and a blue arrow pointing to it. The dashboard also displays an 'Alerts' section with a message about an unrecognized clock-in employee, a 'Compare' section with a 'Sales By Day' table, and a 'Monthly Progress' bar chart.

Alerts

Message	Date
Unrecognized Clock-In Employee from POS	5/15/2017

[View All](#)

Compare

Sales By Day

	Today	Prev Week	Prev Year
Sales	\$50	\$13	\$65
Checks	3	1	5
Average Check	\$16.70	\$12.50	\$12.97

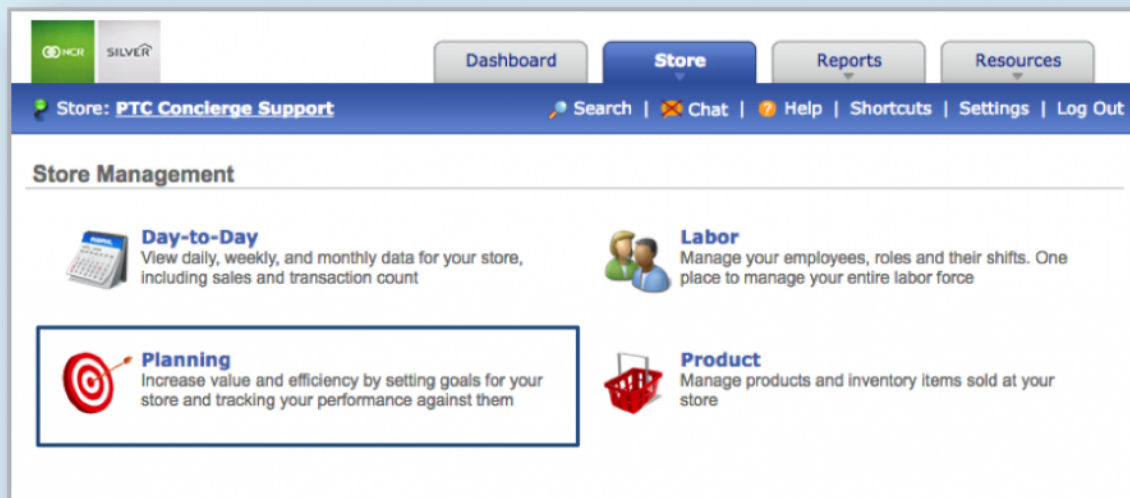
[Previous Day](#)

Monthly Progress

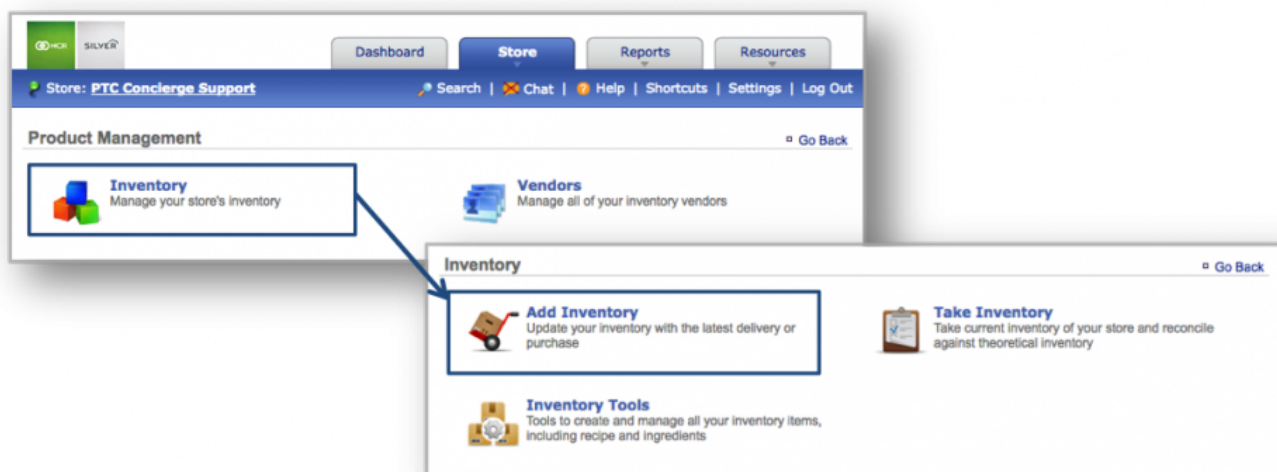
Bar chart showing sales progress for PTC Concierge Support, Silver Gift Shoppe, and Silver Shopping from March 17 to May 17. The Y-axis represents sales in thousands of dollars (\$0 to \$300K).

Month	PTC Concierge Support	Silver Gift Shoppe	Silver Shopping
Mar 17	\$256.1K	\$1.9K	\$11.9K
Apr 17	\$33	\$551.5	\$1.7K
May 17	\$97.6	\$488.3	

* **Hint:** You can also access Inventory by clicking on the **Store** tab and then on **Product** from the Store Management screen.

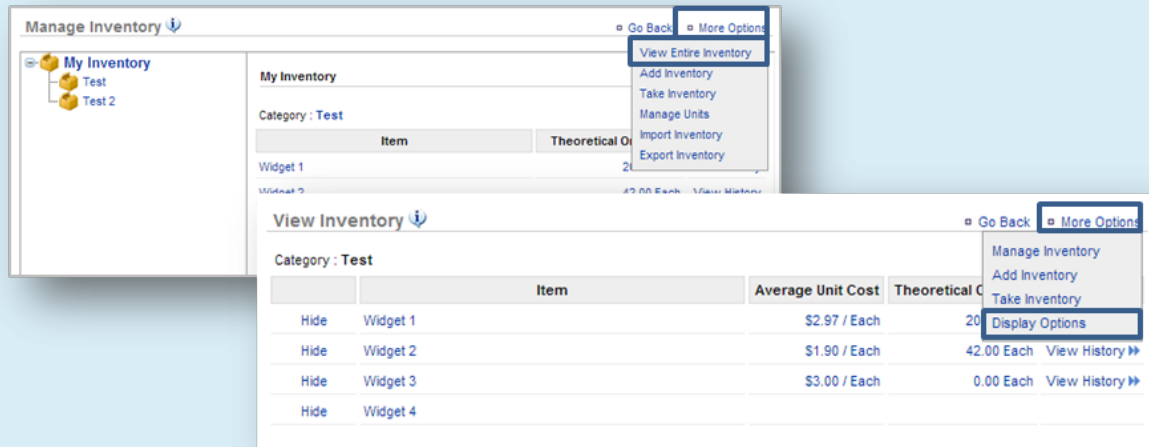


STEP 2: From the Product Management screen, click **Inventory**. Select either **Take Inventory** or **Add Inventory**.



* If you choose to hide inventory via the *Managing Inventory* section, click **More Options**, and then **View Entire Inventory**. From this screen, click **More Options**, and then **Display**

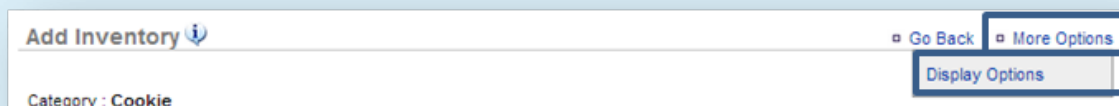
Options.



STEP 3: Click the **Hide** link to the left of the item in the Inventory.



* **Hint:** You can also click **More Options** and then **Display Options** to deselect items so they no longer appear in your list.



If you choose to hide items from the **Display Options** screen, click the box to uncheck those items you wish to hide.

Display Options ⓘ		Go Back
Category : Cookie		
Item	Display	
Original Chocolate Chip	<input checked="" type="checkbox"/>	
Oatmeal Walnut Raisin	<input checked="" type="checkbox"/>	
Pecan	<input checked="" type="checkbox"/>	
Double Fudge	<input checked="" type="checkbox"/>	
White Chunk Macadamia	<input checked="" type="checkbox"/>	
Peanut Butter Supreme	<input checked="" type="checkbox"/>	
Sugar	<input checked="" type="checkbox"/>	
Chewy Chocolate Supreme	<input checked="" type="checkbox"/>	
Chewy Pecan Supreme	<input checked="" type="checkbox"/>	



Once an item has been hidden from you, you will need to access the **Display Options** screen to recheck those items you wish to make visible again.

Related Topics:

[Add Inventory](#)

[Take Inventory](#)

[Manage Inventory](#)

[How to Add a Custom a Unit of Measure](#)

[How to Export Inventory:](#) How to export your inventory database.

Manage Inventory


In this module, you will learn about:


- Inventory Management features
- Glossary of terms
- Getting started with the inventory management platform


Inventory Management Features

Effective inventory management can help to reduce the Cost of Goods (COGs) by quickly managing your inventory through the Console platform.


Inventory [Go Back](#)


**Add Inventory**
Update your inventory with the latest delivery or purchase


**Take Inventory**
Take current inventory of your store and reconcile against theoretical inventory

**Inventory Tools**
Tools to create and manage all your inventory items, including recipe and ingredients

Manage Inventory [Go Back](#)

**Download Products**
Download items from your Point of Sale to create your store inventory

**Raw Ingredient Wizard**
Easy to use form to define your raw inventory items including their package sizes

**Manage Inventory**
Manage inventory settings for your products, raw materials, and build-of-goods

- *Add Inventory*: Allows you to update your inventory of raw ingredients with the latest deliveries or purchases
- *Take Inventory*: Allows you to take current inventory of raw ingredients to reconcile what you have left so that you can compare that against theoretical inventory
- *Inventory Tools*: Allows you to create and manage all inventory items, which includes recipes and raw ingredients. Those tools include:

- *Download Products*: Allows you to connect to your POS so that you can download your POS menu into a Product (Recipe) folder within Console
- *Doing so gives you the ability to create recipes based off of the raw ingredients that you add to the system*
 - *Raw Ingredient Wizard*: Allows you to create all of the raw ingredients that you carry
 - *Manage Inventory*: Provides you with access to all ingredients and products that have been created or downloaded to the inventory platform

Glossary of Terms

You will encounter the following inventory terms as you navigate the inventory management feature.

- **Add Inventory**: Occurs when you receive an order
- **Take Inventory**: When you take inventory of what you have on *hand* the day you typically take inventory (*which may include recent deliveries*), or to establish a starting inventory
 - If you are establishing your initial inventory for products you already have on hand, you can perform a “**Take**” to set your starting quantities. This will allow you to tell the system what you have on hand without skewing reporting costs
- **On Hand**: A snapshot of what you *currently* have in inventory
- **Theoretical On Hand**: Uses POS and *Actual* data to determine what you should currently have in inventory. Inventory items (products/recipes) must be tied to the POS to determine *Theoretical On Hand* totals
- **Auto Depletion**: When an item that correlates to a recipe is rung up on the POS that item will auto-deplete from inventory to give you what you should *actually* have on hand. *The item must be part of a recipe that is also tied to the POS*
- **Actual Inventory**: Reconciles with Auto Depletion to determine what you have on hand. This occurs when you take inventory
- **View History**: Provides you with historical data to show how Theoretical On Hand totals were calculated
- **Cost of Goods (COGs)**: The value of goods sold during a particular period of time
- **Inventory Discrepancy**: Depicts actual vs. ideal inventory

Getting Started With Inventory Management

Complete the below checklist to get the most out of what the Inventory Management platform has to offer.

1. Download products from the **Manage Inventory** platform (see **Download Products and Download Modifiers training modules**)

- a. These products and modifiers are a duplicate of the buttons that have been set up on your POS
 - b. These products and modifiers are your 'recipes' which you will apply raw ingredients to for auto-depletion purposes
 2. Create your complete list of raw ingredients via the Raw Ingredient Wizard (see **Raw Ingredient Wizard training module**)
 - a. Complete the **Creating Custom Units of Measure training module** which supports the management of raw ingredients
 3. Complete recipe creation for all of your products (see the **Recipe Creation training module**)
 4. Establish par levels (see **Establishing Par Levels training module**)
 5. **Take Inventory** to establish your starting quantities (see **Take Inventory training module**)
 - a. If you are a new business with **NO** starting quantities, you will need to instead perform an "**Add Inventory**" as you receive order(s)
 6. **Add Inventory** (see **Add Inventory training module**) for any new deliveries you receive
 - a. **Important:** If you have reconciled inventory (performed a "**Take**"), you can an "**Add**" prior to the date of your last "**Take**," as long as it is within 30 days of the current date
 7. **Take Inventory** as you normally would to reconcile inventory (see **Take Inventory training module**)
- [Click here to see the full details.](#)

Download Modifiers

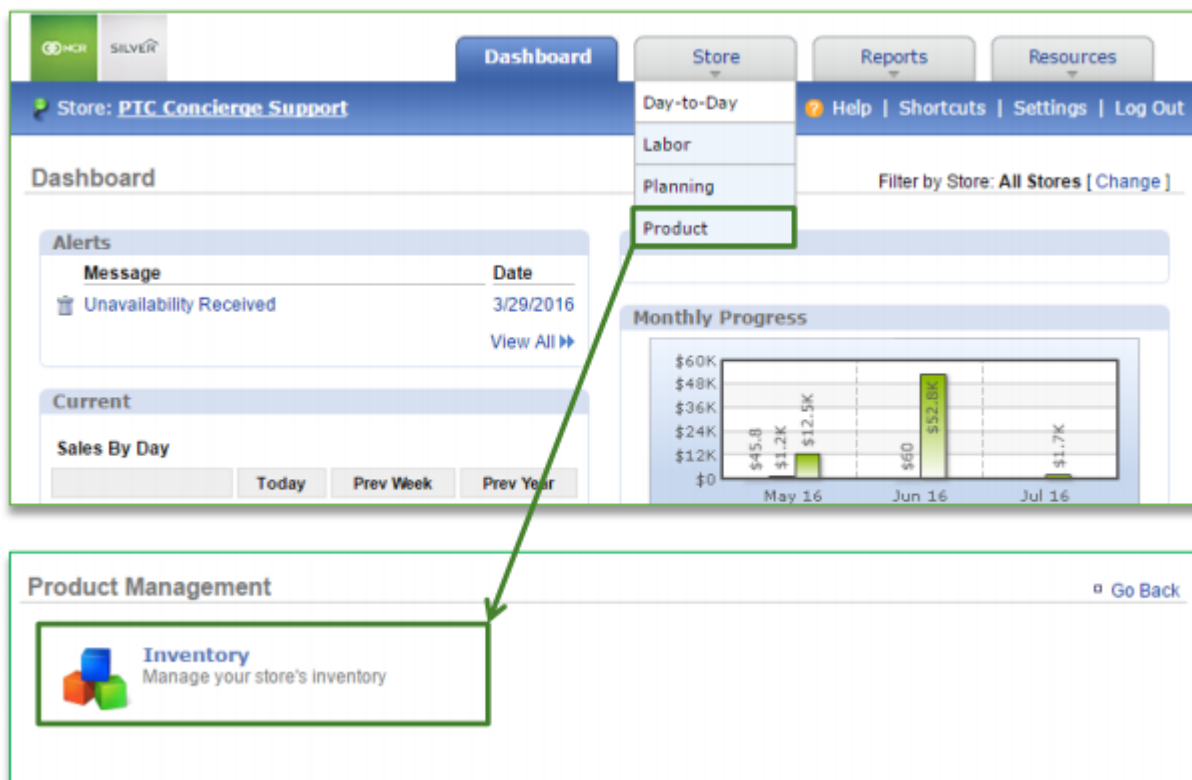
In this module, you will learn:

- How to download modifiers (for recipes purposes) to the inventory platform within Console

Downloading Products to Inventory

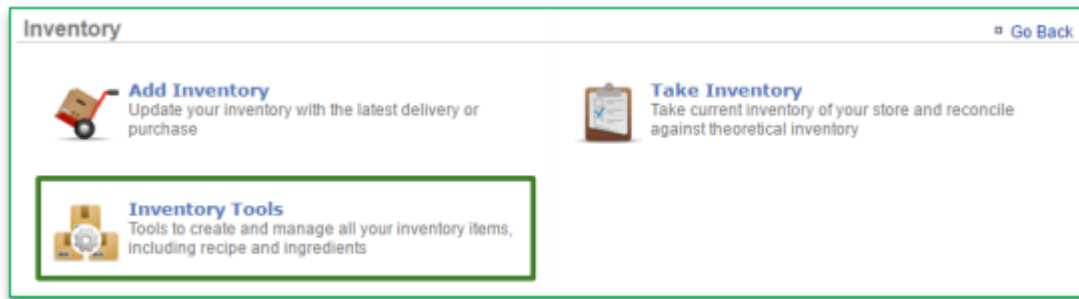
Modifiers within Console refer to those modifiers that are tied to product items within the menu on your Point of Sale (POS). Modifiers are made up of raw ingredients that will also need to be set up within Console for effective inventory management.

To download modifiers you will need to navigate to the **Product Management** module and click **Inventory**.

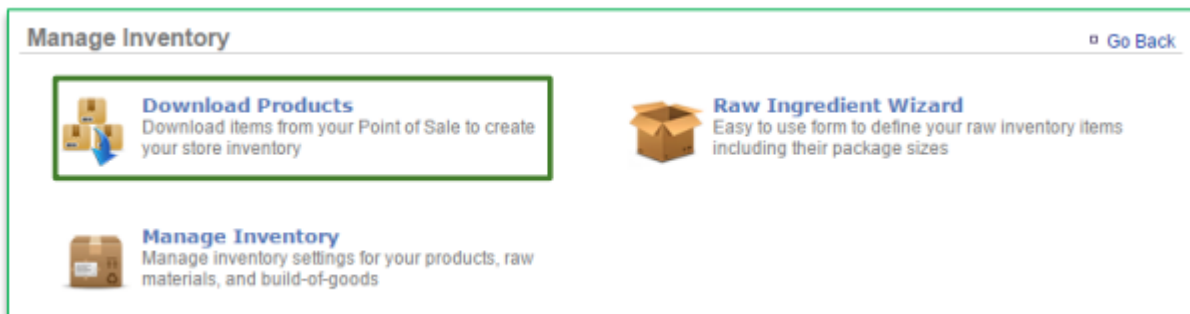


To Download Products

1. Click **Inventory Tools**



2. Click **Download Products**

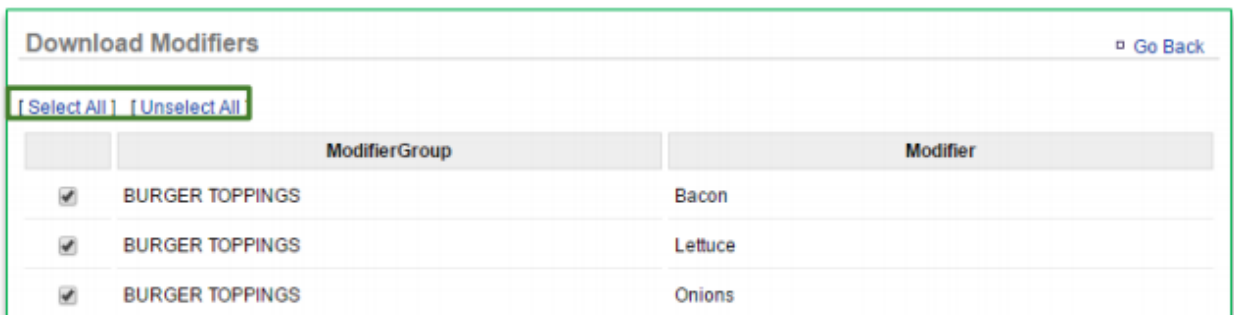


3. Click **Download Modifiers**



4. Those modifier items set up on your POS will appear on the screen

- a. You have the option to select those items you wish to import to inventory



5. Click **Download Modifiers**

<input checked="" type="checkbox"/>	YOGURT TOPPINGS	banana
<input checked="" type="checkbox"/>	YOGURT TOPPINGS	mochi
<input checked="" type="checkbox"/>	YOGURT TOPPINGS	strawberry
<input checked="" type="checkbox"/>	YOGURT TOPPINGS	syrup
		<input type="button" value="Download Modifiers"/> <input type="button" value="Cancel"/>

6. Navigate back to the **Manage Inventory** platform

- a. The items you download will appear within a folder titled **Modifiers**

The screenshot shows the 'Manage Inventory' interface. On the left, a tree view under 'My Inventory' includes folders for 'Modifiers', 'BURGER TOPPINGS', 'YOGURT TOPPINGS', 'Products', 'Raw Ingredients', and 'test'. The 'Modifiers' folder is highlighted with a green box. On the right, the 'Category : BURGER TOPPINGS (Options)' section displays a table with two columns: 'Item' and 'Theoretical On Hand'. The table lists 'Bacon', 'Lettuce', and 'Onions'.

Item	Theoretical On Hand
Bacon	
Lettuce	
Onions	

- [Click here to see the full details](#)

Recipe Creation

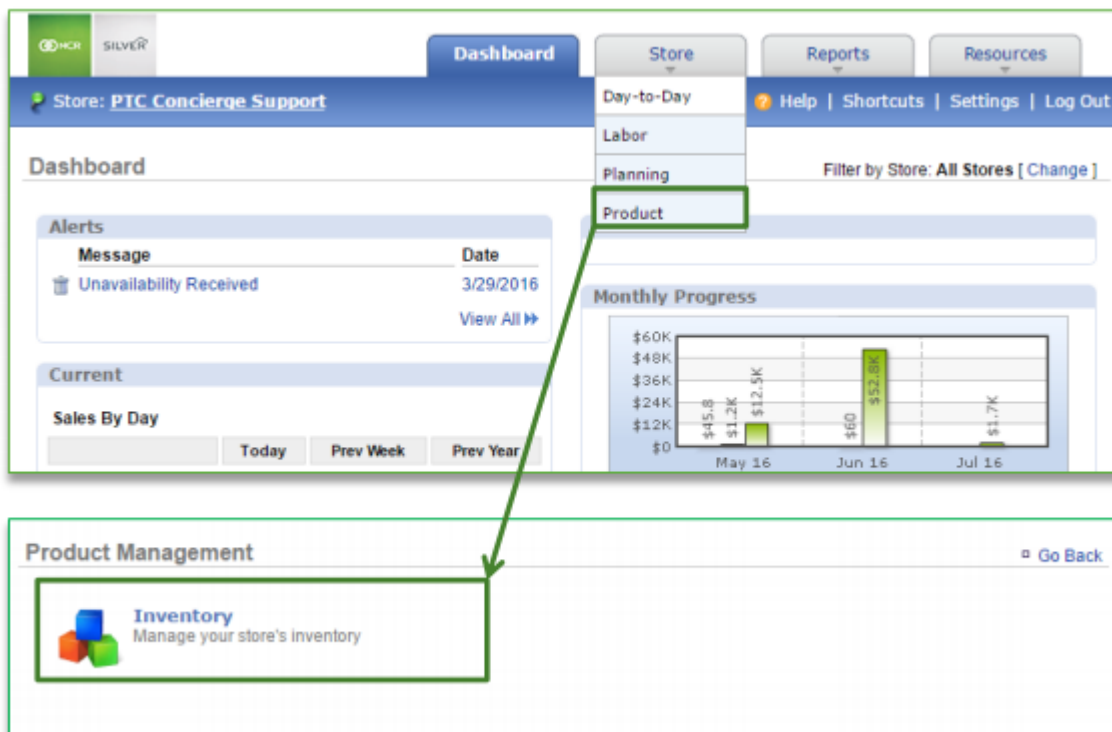
In this module, you will learn:

- How to create recipes from your list of raw ingredients within Console.

Recipe Creation

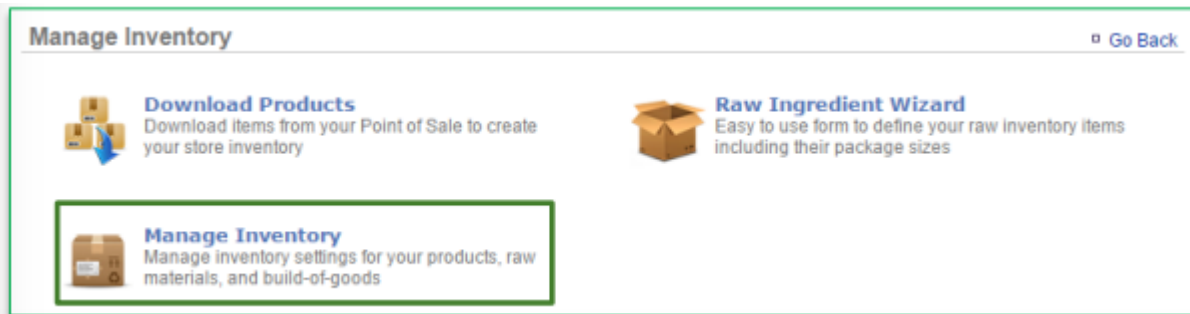
Keep in mind that if Console is supporting your brand with inventory management, this feature may not be accessible within your Console account.

To create recipes you will need to navigate to the **Product Management** module and click **Inventory**.

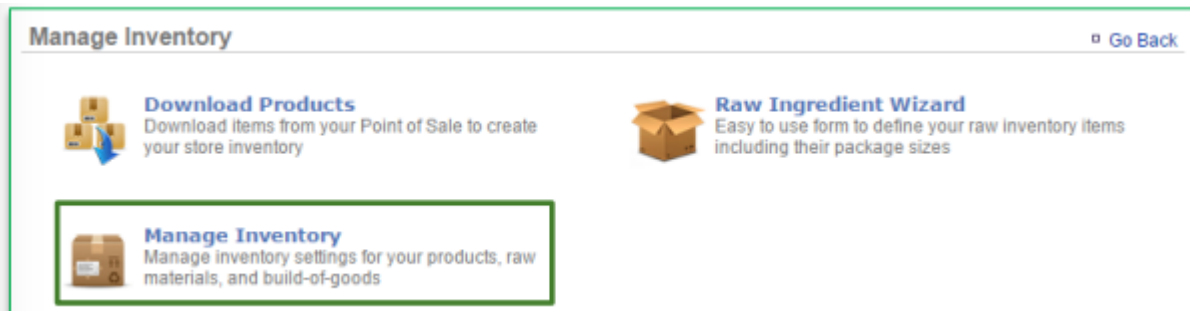


To Export Inventory

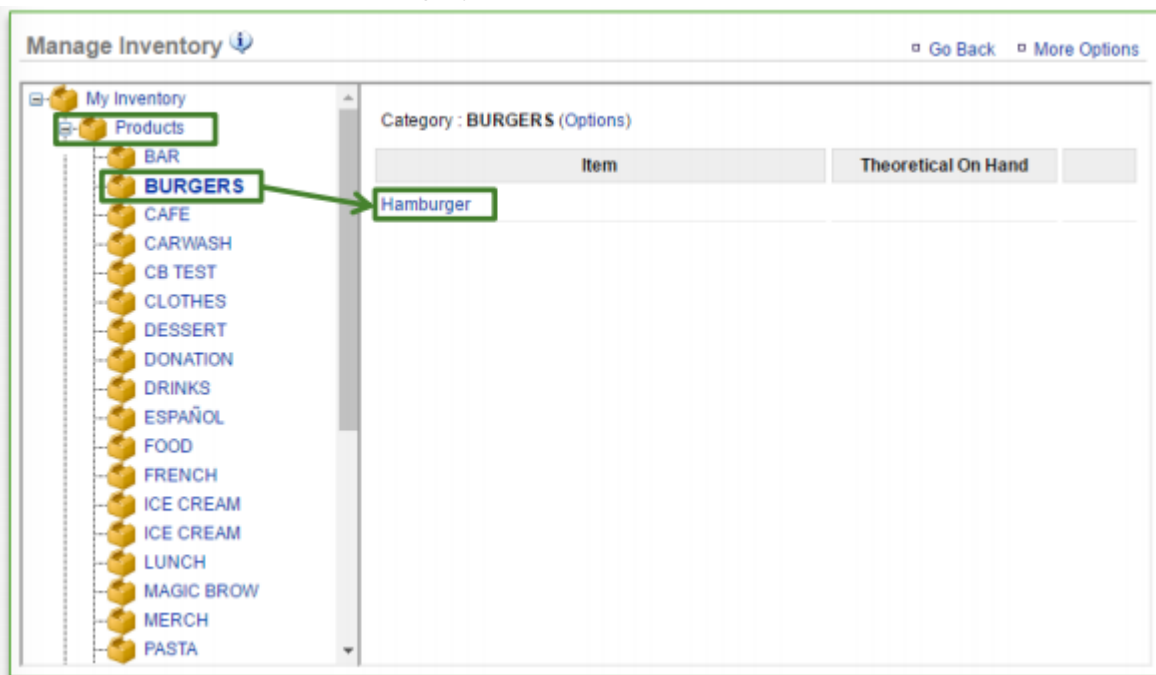
1. Click **Inventory Tools**



2. Click **Manage Inventory**



3. Click the **Products (or Modifiers)** folder to the left of the screen to expand the category
4. Click a subcategory
5. Click an item within the sub category



6. Click **Edit Recipe**

Item: Hamburger Go Back More Options

Item Information

Name: Hamburger	Cost:
Category: BURGERS	Price: \$8.00
Description:	Unit Type: Each
SKU:	Theoretical On Hand:
Model Number:	Minimum Quantity:
Manufacturer:	Maximum Quantity:
Vendor:	Taxable: No
Vendor Product Name:	Discontinued: No
Vendor Product ID:	Identified on the POS as: Hamburger

[Edit Item Information](#)

Recipe

Not Applicable

[Edit Recipe](#)

7. Click **Select Recipe Items**8. Click **Add New Item**

Edit Item: Hamburger Go Back More Options

Item Information **Recipe**

☐ Not Applicable

☒ **Select Recipe Items**

List of Items

Item	Quantity
Add New Item	

The recipe above produces the following quantity of Hamburger:

Select a unit ▼

Save Cancel

9. Click the **Raw Ingredients** folder to expand the selection

10. Select desired subcategory

11. Select applicable item within the subcategory

12. Enter quantity
13. Select Units
14. Click **Save**

The screenshot shows the 'Edit Item: Hamburger' window. An 'Add Item' dialog box is open, displaying a hierarchical tree of 'My Inventory'. The tree structure is as follows:

- My Inventory
 - Products
 - Raw Ingredients (highlighted with a green box)
 - Bag
 - Bread
 - Carton/Can
 - Dairy
 - Frozen
 - Meat (highlighted with a green box)
 - Burger (highlighted with a green box)
 - chicken breast
 - ground beef
 - pork butt
 - shrimp
 - top sirloin steak

Below the tree, the 'Item Name' is 'Burger'. The 'Quantity' is set to '1' and the 'Units' are set to 'Each'. The background window shows the 'Item Information' tab with 'Select Recipe Items' selected. A 'List of Items' section is visible, and a 'Quantity' input field is on the right. At the bottom of the dialog box, there are 'Save' and 'Cancel' buttons.

15. Each item will appear within the list of items for this recipe
 - a. Continue adding items until you have completed your recipe
 - b. Keep in mind that quantity and units will vary based off of how you receive the item
 - c. It is important that the recipe usage compliments the unit of measure that the raw ingredient is set up with. For example:
 - i. If you set up Burger Patties as a raw ingredient and they are delivered as a case of 100 patties, the recipe units should reference the number of patties used to create that recipe (e.g. 1 each)
 - ii. If you set up a Ketchup as a raw ingredient and it is delivered as a 1 gallon container, the recipe units should reference the number of ounces used to create that recipe (e.g. 2 ounces)
16. Enter the quantity of the item that the recipe build yields. For example:
 - a. For a hamburger, the total quantity for the recipe items shown yields 1 each (or 1 hamburger)

17. Click **Save**

Edit Item: Hamburger

Item Information | **Recipe**

☐ Not Applicable
☒ Select Recipe Items

List of Items

	Item	Quantity
[Edit] [Delete]	Burger	1 Each

[Add New Item](#)

The recipe above produces the following quantity of Hamburger:

Select a unit ▼

[Save](#) [Cancel](#)

18. You will be redirected to the Item Information screen which now reflects the cost of goods for that item. Click **Go Back** to navigate back to the Manage Inventory screen to continue building recipes

Item: Hamburger

[Go Back](#) [More Options](#)

Item Information

Name: Hamburger
 Category: BURGERS
 Description:
 SKU:
 Model Number:
 Manufacturer:
 Vendor:
 Vendor Product Name:
 Vendor Product ID:

Cost:
 Price: \$8.00
 Unit Type: Each
 Theoretical On Hand:
 Minimum Quantity:
 Maximum Quantity:
 Taxable: No
 Discontinued: No
 Identified on the POS as: Hamburger

[Edit Item Information >>](#)

Recipe

Name	Quantity	Cost
Burger	1 Each	\$0.51
Total Cost		\$0.51
Price		\$8.00
COGS %		6.3%
Margin		93.7%

The recipe above produces 1 Each of Hamburger.

[Edit Recipe >>](#)

- [Click here to see the full details](#)

Export Inventory

The purpose of this section is to illustrate how to export your inventory database.

Exporting Inventory

STEP 1: From your Dashboard view, mouse over the **Store** tab and click **Product**.

The screenshot shows the NCR Silver dashboard for the store 'PTC Concierge Support'. The 'Store' tab is active, and a dropdown menu is open, showing options: Day-to-Day, Labor, Planning, and Product. The 'Product' option is highlighted. The dashboard includes sections for Alerts, Compare (Sales By Day), and Monthly Progress (a bar chart showing sales for Mar 17, Apr 17, and May 17).

Alerts

Message	Date
Unrecognized Clock-In Employee from POS	5/15/2017

[View All](#)

Compare

Sales By Day

	Today	Prev Week	Prev Year
Sales	\$50	\$13	\$65
Checks	3	1	5
Average Check	\$16.70	\$12.50	\$12.97

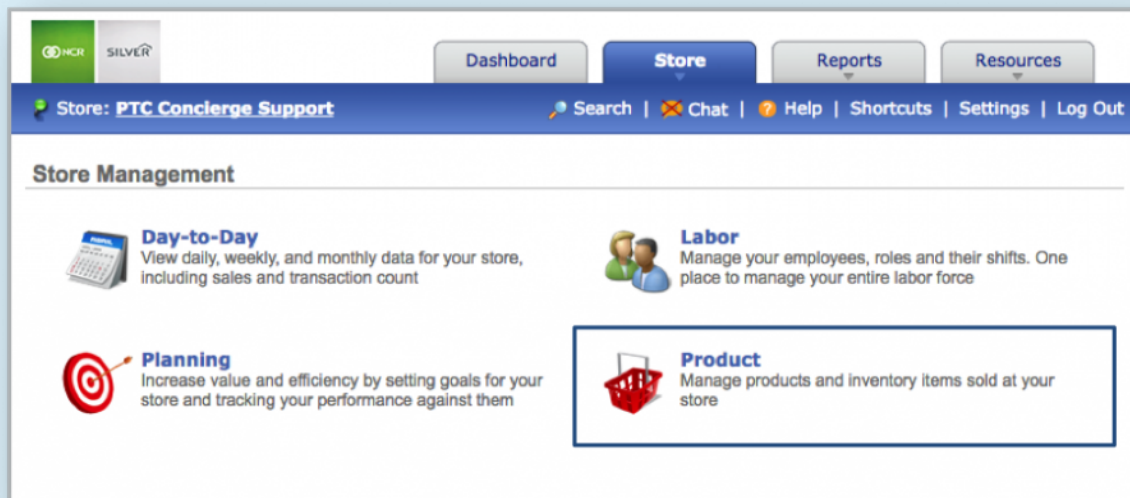
[Previous Day](#)

Monthly Progress

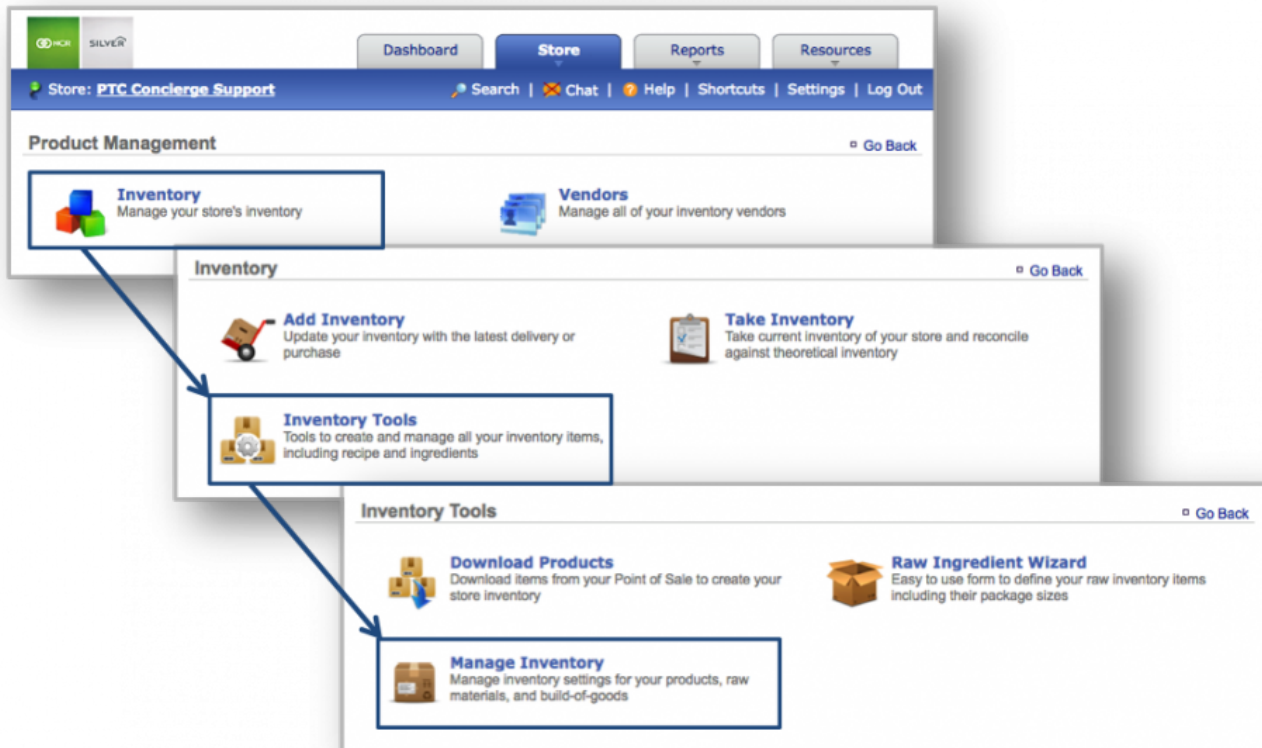
Bar chart showing sales for Mar 17, Apr 17, and May 17. The Y-axis ranges from \$0 to \$300K. The legend indicates: PTC Concierge Support (blue), Silver Gift Shoppe (orange), and Silver Shopping (green).

Month	PTC Concierge Support	Silver Gift Shoppe	Silver Shopping
Mar 17	\$256.1K	\$1.9K	\$11.9K
Apr 17	\$33	\$551.5	\$1.7K
May 17	\$97.6	\$486.3	\$1.7K

* **Hint:** You can also access Inventory by clicking on the **Store** tab and then on **Product** from the Store Management screen.



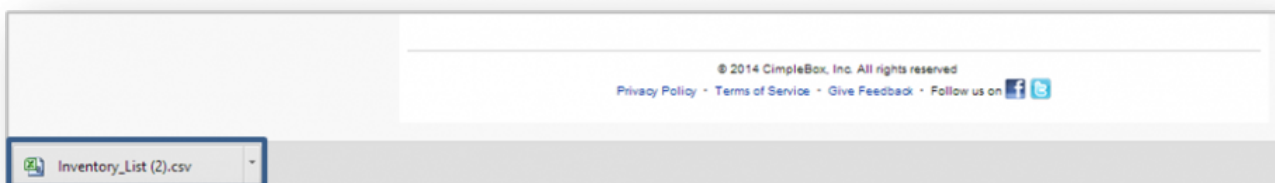
STEP 2: From the Product Management screen, click **Inventory** and then **Manage Inventory**.



STEP 3: Click **More Options** at the top right corner and then **Export Inventory**.

The screenshot shows the 'Manage Inventory' page. On the left, a sidebar lists 'My Inventory' with sub-items: 'Modifiers', 'Products', and 'Raw Ingredients'. A blue box labeled 'Category of Inventory Items.' points to 'Raw Ingredients'. The main area shows three inventory lists. The first list is for 'Category: Raw Ingredients > abc' with items 'asdf' and 'asdf'. A blue box labeled 'List of inventory items within that category.' points to this list. The second list is for 'Category: Raw Ingredients > Bag' with items 'chocolate cake mix', 'rice', and 'spanish rice'. The third list is for 'Category: Products > BAR'. A blue box labeled 'New Category' points to a button in the top right. A dropdown menu for 'More Options' is open, showing options: 'View Entire Inventory', 'Add Inventory', 'Take Inventory', 'Manage Units', 'Export Inventory', and 'Download Inventory'. The 'Export Inventory' option is highlighted.

Your inventory database will automatically open in an excel file at the bottom of the screen.



Save the database to your computer.

Related Topics:

[Add Inventory](#)

[Take Inventory](#)

[How to Hide or Display Items](#)

Manage Inventory**How to Add a Custom a Unit of Measure**

Custom Unit of Measure

The purpose of this section is to illustrate how to add a custom unit of measure to your inventory.

Adding a Custom Unit of Measure

STEP 1: From your Dashboard view, mouse over the **Store** tab and click **Product**.

The screenshot shows the NCR Silver dashboard for the store 'PTC Concierge Support'. The 'Store' tab is selected, and the 'Product' option is highlighted in the dropdown menu. The dashboard includes sections for Alerts, Compare (Sales By Day), and Monthly Progress (a bar chart showing sales for March, April, and May 2017).

Alerts

Message	Date
Unrecognized Clock-In Employee from POS	5/15/2017

[View All](#)

Compare

Sales By Day

	Today	Prev Week	Prev Year
Sales	\$50	\$13	\$65
Checks	3	1	5
Average Check	\$16.70	\$12.50	\$12.97

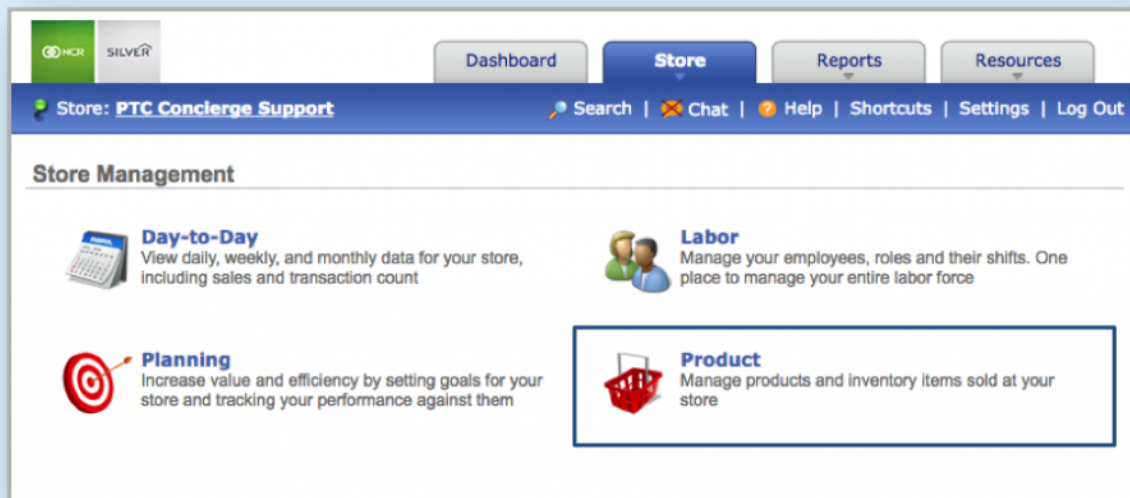
[Previous Day](#)

Monthly Progress

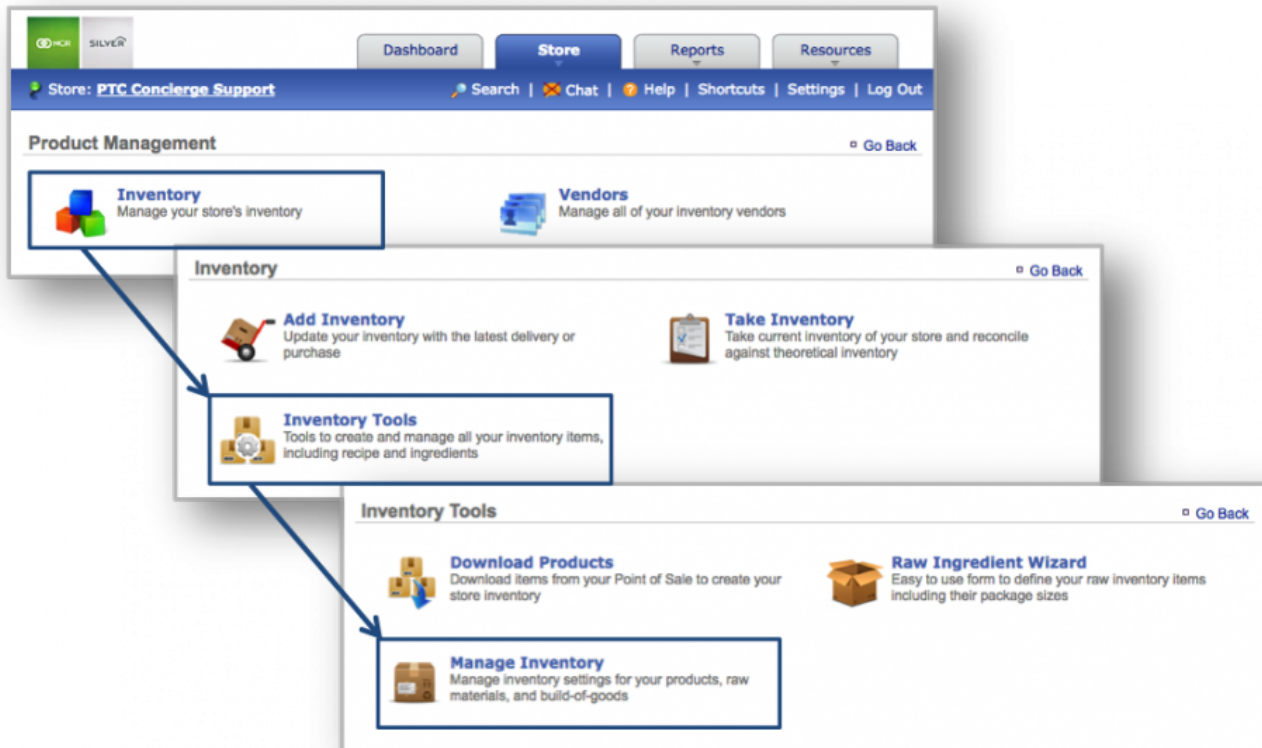
Bar chart showing sales for March 17, April 17, and May 17. The Y-axis ranges from \$0 to \$300K. The legend indicates sales for PTC Concierge Support (blue), Silver Gift Shoppe (orange), and Silver Shopping (green).

Month	PTC Concierge Support	Silver Gift Shoppe	Silver Shopping
Mar 17	\$256.1K	\$1.9K	\$11.9K
Apr 17	\$33	\$551.5	\$1.7K
May 17	\$97.6	\$486.3	\$1.7K

* **Hint:** You can also access Inventory by clicking on the **Store** tab and then on **Product** from the Store Management screen.



STEP 2: From the Product Management screen, click **Inventory** and then **Manage Inventory**.



INVENTORY MANAGEMENT SCREEN

The screenshot shows the 'Manage Inventory' screen in a web application. The interface includes a top navigation bar with 'Dashboard', 'Store', 'Reports', and 'Resources'. Below this is a sub-header with 'Store: PTC Concierge Support' and links for 'Search', 'Chat', 'Help', 'Shortcuts', 'Settings', and 'Log Out'. The main content area is titled 'Manage Inventory' and features a left sidebar with a tree view containing 'My Inventory', 'Modifiers', 'Products', and 'Raw Ingredients'. The 'Raw Ingredients' item is highlighted with a blue box and an arrow pointing to it with the text 'Category of Inventory Items.'.

The main content area displays a 'My Inventory' section with a 'New Category' button. Below this, there are three category filters: 'Raw Ingredients > abc', 'Raw Ingredients > Bag', and 'Products > BAR'. Each filter is followed by a table with columns 'Item' and 'Theoretical On Hand'. The 'Raw Ingredients > Bag' table contains three rows of data: 'chocolate cake mix' (600.00 3 lb chocolate cake), 'rice' (96.95 12 lb rice), and 'spanish rice' (798.81 12 lb spanish rice). Each row has a 'View History' link. A blue box with the text 'List of inventory items within that category.' points to the 'Item' column of the 'Raw Ingredients > Bag' table.

A 'More Options' button is located in the top right corner of the main content area. A dropdown menu is open, showing the following options: 'View Entire Inventory', 'Add Inventory', 'Take Inventory', 'Manage Units', 'Export Inventory', and 'Download Inventory'. The 'Manage Units' option is highlighted with a blue box.

Add a Custom Unit

STEP 1: From the Manage Inventory screen, click **More Options** and then **Manage Units**.

STEP 2: Click **More Options** at the top right and then **New Unit**.

Units ⓘ

Go Back More Options

New Unit

Custom Units

Unit	Abbreviation
------	--------------

Available Units

Unit	Abbreviation
Teaspoon	tsp
Tablespoon	tbsp
Fluid Ounce	fl oz
Pint	pt
Quart	qt
Gallon	gal
Ounce	oz
Pound	lb
Each	Each
Other	Other

STEP 3: Enter the unit information and click **Save** when done.

New Unit ⓘ

Go Back

Name :

Abbreviation :

Does this unit have a conversion unit? : ☒ Yes ☐ No

Unit Conversion : 1 Unit =



Hint: You can choose a unit of measure for any item by selecting that item from the *Manage Inventory* screen and click ***Edit Item Information***.

Related Topics:

[Add Inventory](#)

[Take Inventory](#)

[How to Hide or Display Items](#)

[Manage Inventory](#)

[How to Export Inventory](#): How to export your inventory database.

Set Par Levels

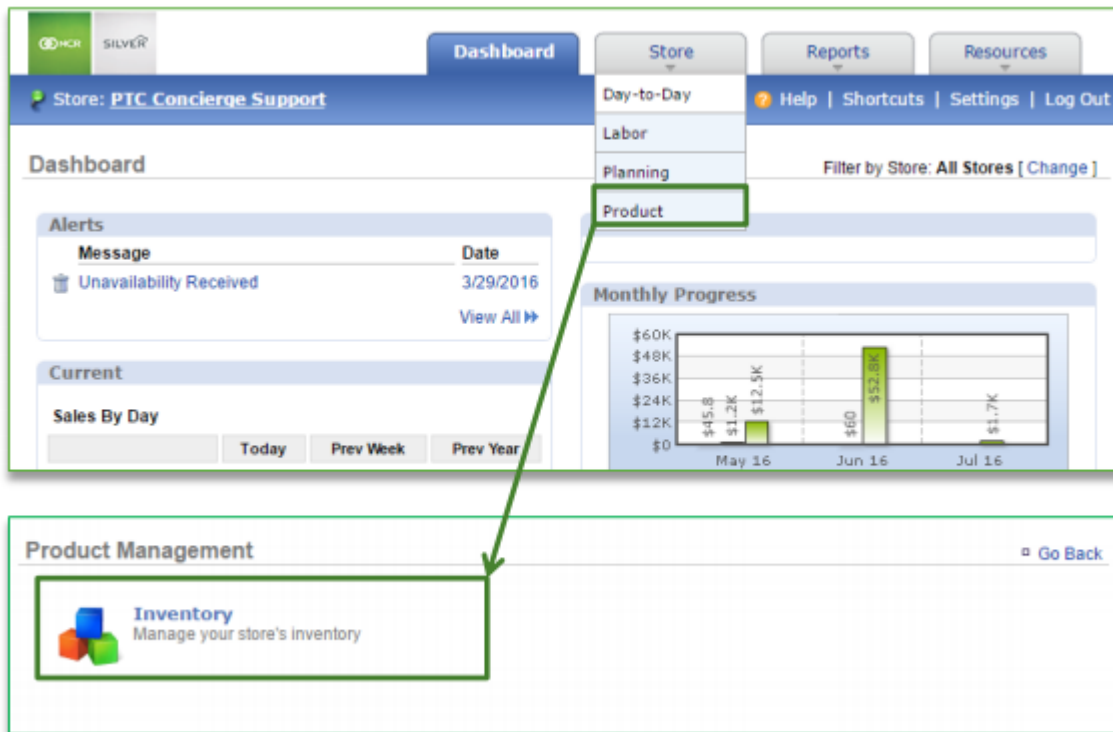
In this module, you will learn:

- How to set par levels from your inventory items within Console

Setting Par Levels

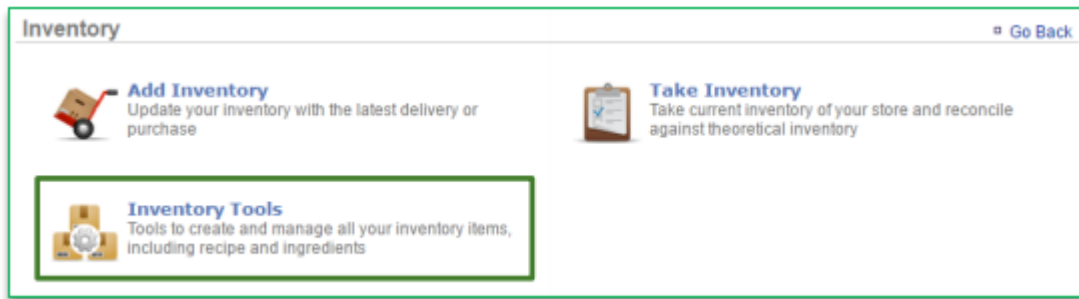
You must have access to the Manage Inventory module within Console in order to set part levels for inventory items.

To set par levels you will need to navigate to the **Product Management** module and click **Inventory**.

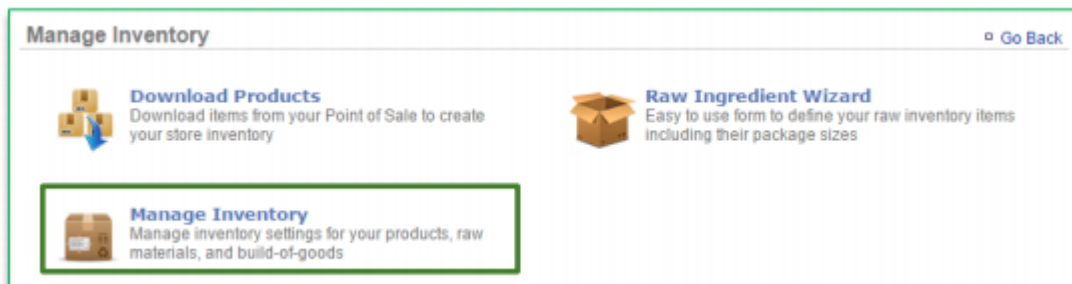


To Set Par Levels

1. Click **Inventory Tools**



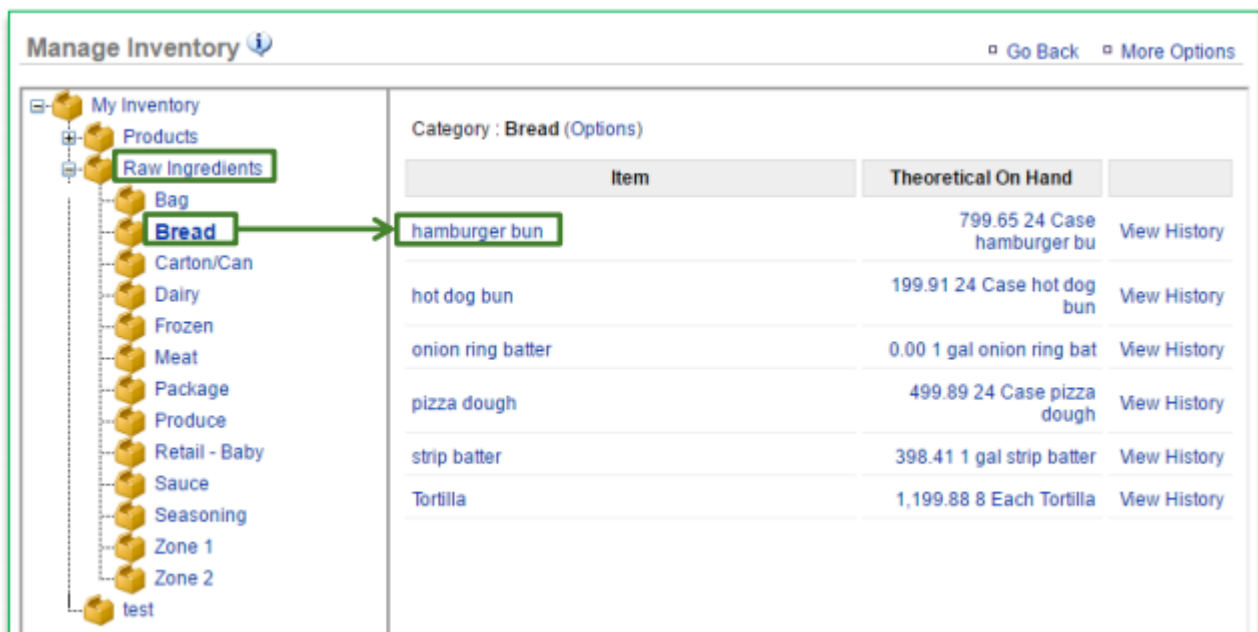
2. Click **Manage Inventory**



3. Click the **Raw Ingredients** folder to the left of the screen to expand the category

4. Click a subcategory

5. Click an item within the subcategory



6. Click **Edit Item Information**

Item: *hamburger bun* ⓘ Go Back More Options

Item Information

Name: hamburger bun	Cost:
Category: Bread	Price:
Description:	Unit Type: 24 Case hamburger bun
SKU:	Theoretical On Hand: 799.65
Model Number:	Minimum Quantity:
Manufacturer:	Maximum Quantity:
Vendor:	Taxable: No
Vendor Product Name:	Discontinued: No
Vendor Product ID:	Identified on the POS as:

[Edit Item Information >>](#)

7. Enter **Minimum Quantity**

- a. Quantity is based off the default unit type that is selected

8. Enter **Maximum Quantity**

- a. Quantity is based off the default unit type that is selected

9. Click **Save**

Edit Item: *hamburger bun* ⓘ

Item Information Recipe

Category: Bread [\[Change \]](#)

Name (Required): hamburger bun

Description:

SKU:

Model Number:

Manufacturer:

Vendor: Select a vendor ▼

Vendor Product Name:

Vendor Product ID:

Price:

Unit Type (Required): 24 Case hamburger bun ▼

Minimum Quantity: 5

Maximum Quantity: 10

Taxable: No ▼

Discontinued: No ▼

Identified on the POS as:

Category	Item
<input type="checkbox"/> ?	?
<input type="checkbox"/> ADMISSION	Admission (12 & UNDER)
<input type="checkbox"/> ADMISSION	Admission (ADULT)
<input type="checkbox"/> ADMISSION	Admission (SENIORS)
<input type="checkbox"/> ADMISSION	Admission (YOUTH)
<input type="checkbox"/> ADMISSION	Adult Pass
<input type="checkbox"/> ADMISSION	BackStage Pass Adult
<input type="checkbox"/> ADMISSION	BackStage Pass Child

[Save](#) [Cancel](#)

10. You will be redirected to the **Item Information** screen. Click **Go Back** to go back to the **Inventory Management** screen

The screenshot shows the 'Item Information' screen for 'hamburger bun'. At the top, there is a header bar with 'Item: hamburger bun' and a blue information icon. To the right of the header are two buttons: 'Go Back' (highlighted with a green box) and 'More Options'. Below the header is a section titled 'Item Information' containing two columns of data. The left column lists: Name: hamburger bun, Category: Bread, Description:, SKU:, Model Number:, Manufacturer:, Vendor:, Vendor Product Name:, and Vendor Product ID:. The right column lists: Cost:, Price:, Unit Type: 24 Case hamburger bun, Theoretical On Hand: 799.65, Minimum Quantity: 5.00, Maximum Quantity: 10.00, Taxable: No, Discontinued: No, and Identified on the POS as:. At the bottom right of this section is a link 'Edit Item Information >>'. Below the 'Item Information' section is a section titled 'Recipe' with the text 'Not Applicable' and a link 'Edit Recipe >>' at the bottom right.

Item Information	
Name: hamburger bun	Cost:
Category: Bread	Price:
Description:	Unit Type: 24 Case hamburger bun
SKU:	Theoretical On Hand: 799.65
Model Number:	Minimum Quantity: 5.00
Manufacturer:	Maximum Quantity: 10.00
Vendor:	Taxable: No
Vendor Product Name:	Discontinued: No
Vendor Product ID:	Identified on the POS as:

[Edit Item Information >>](#)

Recipe

Not Applicable

[Edit Recipe >>](#)

11. Repeat this process for all items you want to apply par levels to

- Set par levels will be visible within the following Console features:
 - Add Inventory
 - Take Inventory
 - Inventory on Hand Report
 - Par Level Report
- [Click here to see the full details](#)

Reports

This section illustrates how to navigate to, and generate, reports. *Please note that based on your brand's chosen solution, you may notice additional reports in the images throughout this section that may not be visible on your platform.*

Navigating to Reports

From your Dashboard view, mouse over the **Reports** tab and click on the report you wish to see.

The screenshot shows the NCR dashboard interface. At the top, there are tabs for Dashboard, Store, Reports, and Resources. The Reports tab is highlighted, and a dropdown menu is open, listing various report categories: Sales Reports, Daily Summary, Labor, Inventory, Survey, Reviews, Other Data, Key Indicators, Other Reports, and Training. A callout box points to this menu with the text "Select the report you wish to see." The dashboard itself displays several sections: Alerts (with a message about an unrecognized clock-in), Compare (Sales By Day and Sales By Week tables), Current Sales Performance (table with May Sales, Target, and May 2016 MTD), Weather Forecast (for PTC Concierge Support, Silver Gift Shoppe), Today's Schedule, and Sales Forecast (table with Basis, Year Sales, and Week Sales).

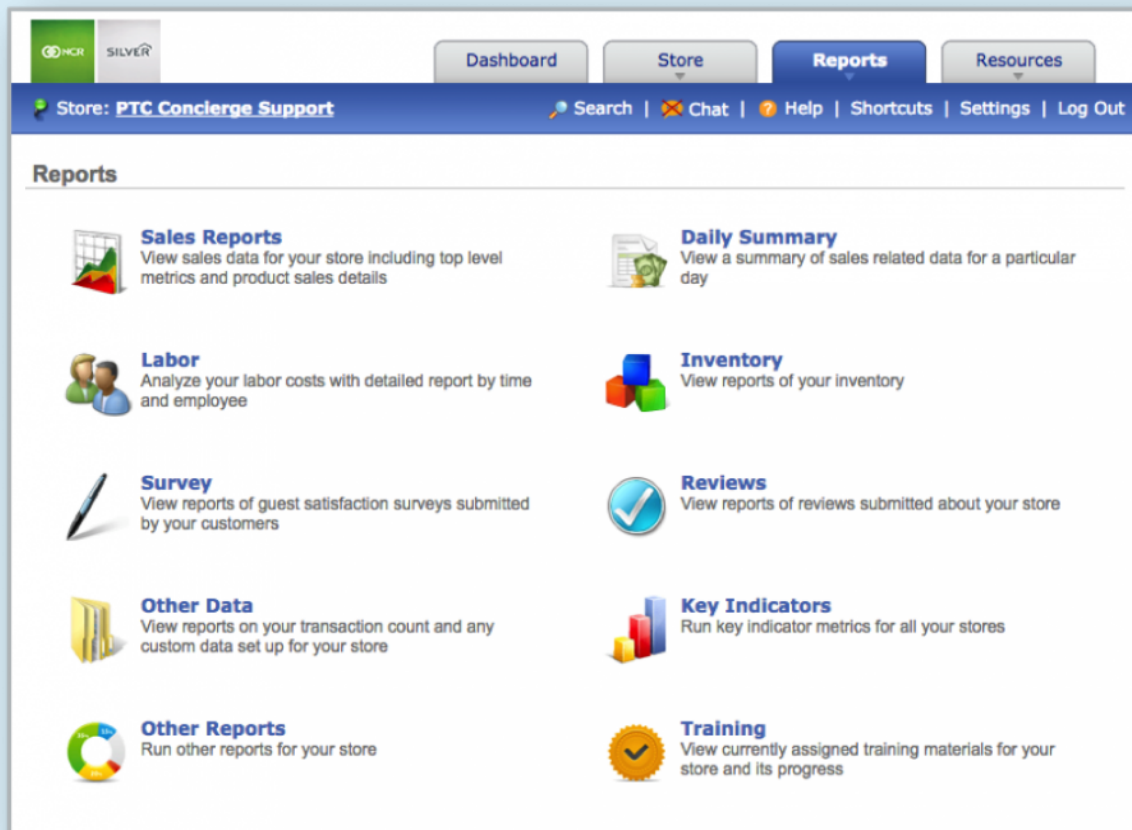
	Today	Prev Week	Prev Year
Sales	\$46	\$562	\$391
Checks	1	10	6
Average Check	\$45.98	\$56.22	\$65.16

	Curr WTD	Prev WTD	Prev Yr WTD
Sales	\$106	\$575	\$456
Checks	5	11	11
Average Check	\$21.29	\$52.24	\$41.44

	May Sales	Target	May 2016 MTD
PTC Concierge Support..	\$1,715	N/A	\$11,480
Silver Gift Shoppe	\$98	N/A	\$2,071
Silver Shopping	\$468	N/A	N/A
Total:	\$2,301	N/A	\$13,551

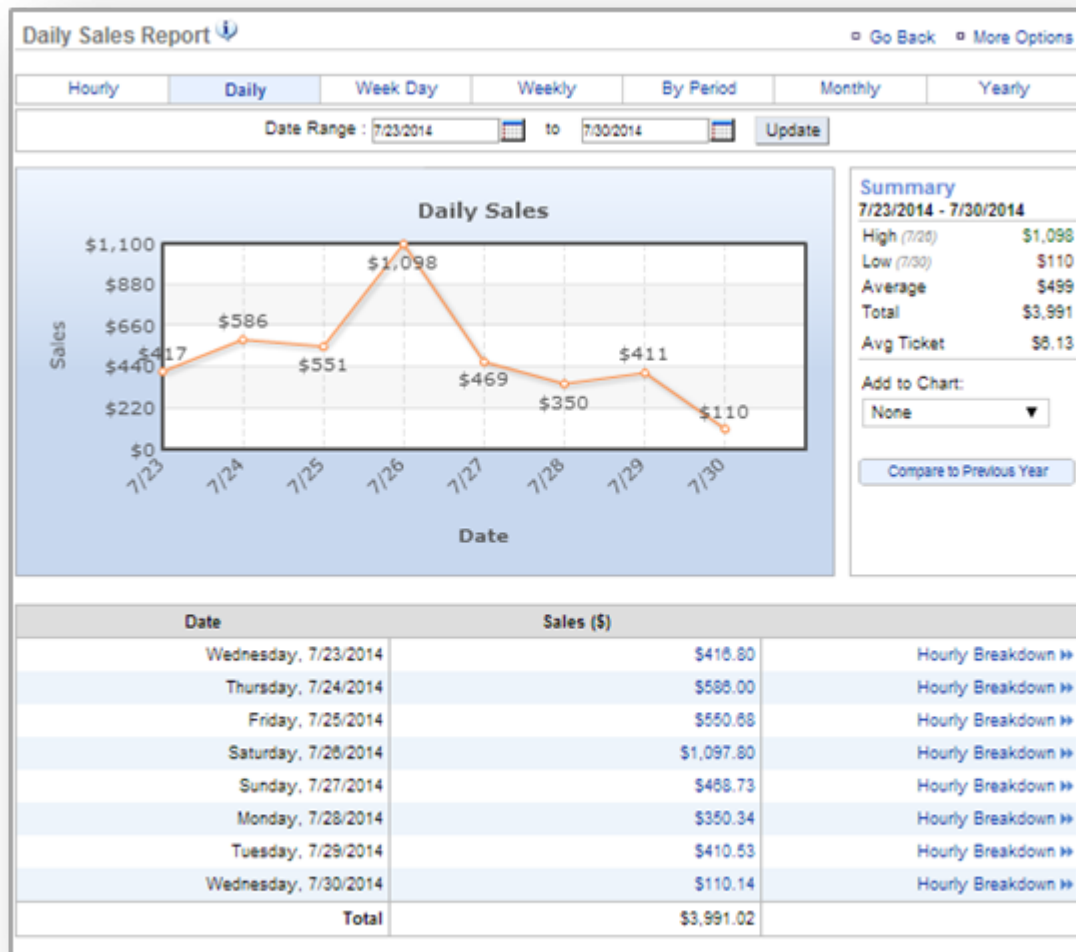
Basis	Year Sales	Week Sales
4 Weeks	\$160,562	\$3,068
8 Weeks	\$117,738	\$2,264
52 Weeks	\$365,650	\$7,032

* **Hint:** You can also access Reports by clicking on the **Reports** tab and then on the report you wish to see.



KEY REPORTS *(Click on a report category to view more detailed information.)*







Sales: View sales over any time period.



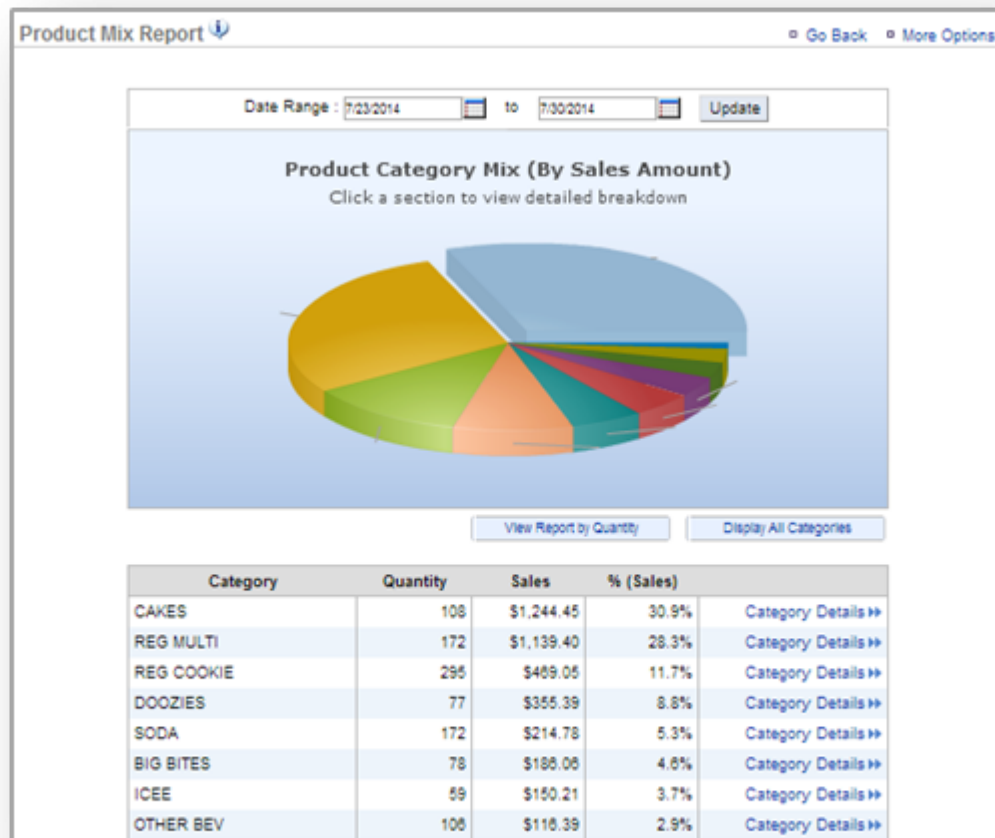
Inventory: View of inventory history, inventory movement, profitability, discrepancies, spending and cost of goods sold.

Inventory Reports

[Go Back](#)


 Inventory History View detailed history of each inventory item going in and out of your store	 Inventory Movement View items that were depleted from your inventory based on your products sold
 Profitability Report Analyze profitability of each of your products sold based on its Cost of Goods Sold	 Discrepancy Report View discrepancies between your actual and theoretical inventories for any given period of time
 Spending Report View a report of spending on your inventory categories and items	 Cost of Goods Sold Calculate Cost of Goods Sold based on the movement of your inventory

Product Mix: View breakdown of your products by category or department sold over any given period of time.




Labor: View labor costs, pay periods, employee history and time card discrepancies.


Labor Reports [Go Back](#)




Labor Costs
View your labor cost breakdown for any given period of time



Pay Period Report
View your payroll cost and trend from pay period to pay period



Employee History
View a history of notes on all of your employees



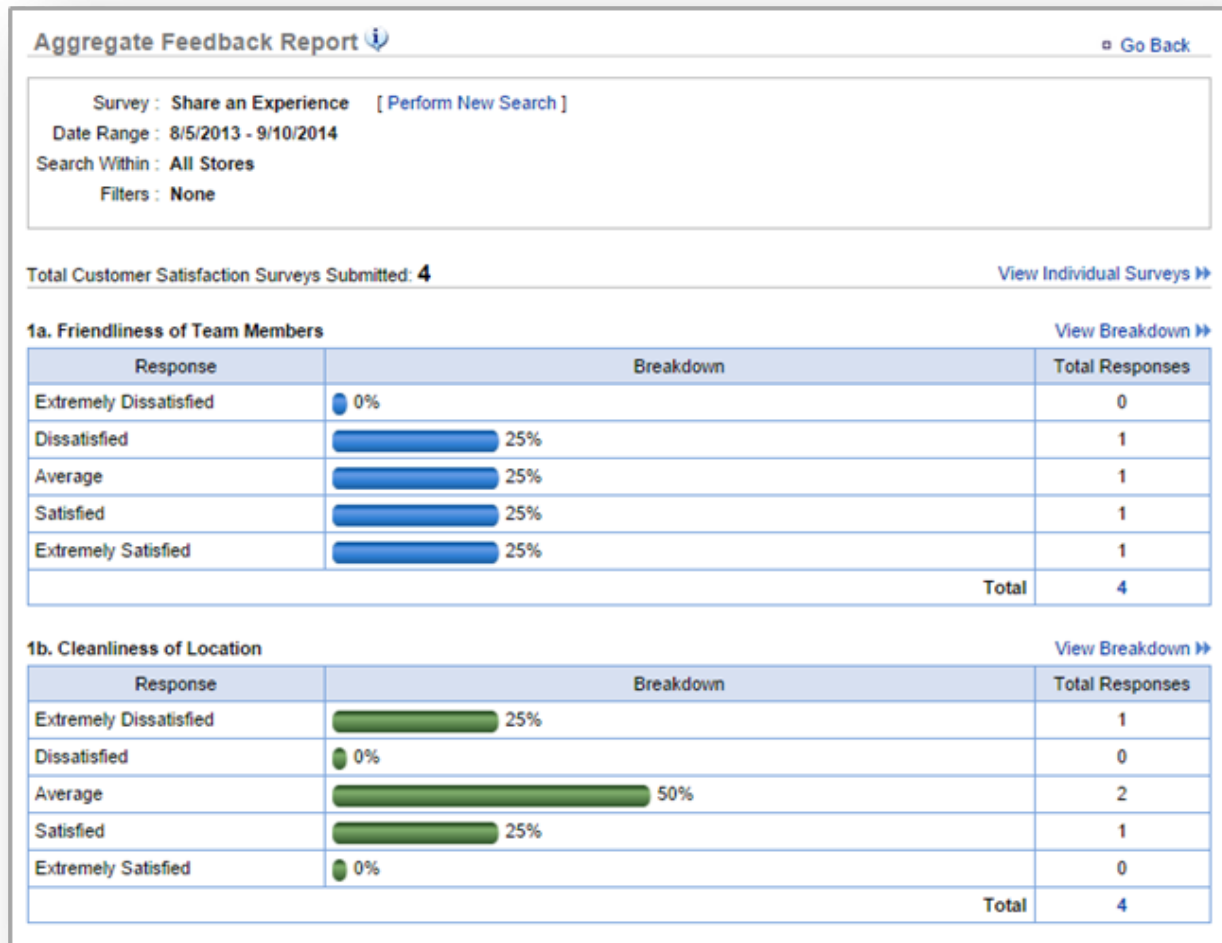
Time Card Discrepancy
Compare employee schedules and their actual time cards

Training: View currently assigned training materials for your store and team member progress.

Training Go Back			
Class	Assigned	Completed	Percent
Recipe Creation			
Spoonable Smoothie	6	0	0.0%
Lemonade Yogurt, Lemonade Chillers & Coffee Chillers Certification Test	5	0	0.0%
Frozen Coffee Chiller Creation	6	0	0.0%
Frozen Lemonade Chiller Creation	3	0	0.0%
Caramel Apple Pie Dream Shake	5	0	0.0%
Artisan Hot Chocolate Certification Test	3	0	0.0%
Smoothie Certification Test	6	1	16.7%
Training Module Videos > Taylor Machine Operations Module			
Assembling the Taylor Machine	6	0	0.0%
Sanitizing the Taylor Machine	6	0	0.0%
Priming the Taylor Machine	6	0	0.0%
Disassembling the Taylor Machine	6	0	0.0%
Taylor Brush Cleaning	6	0	0.0%
Certification Test	6	0	0.0%

Survey: View reports for guest satisfaction surveys submitted by your customers. Surveys are not limited to guest satisfaction and can pertain to an array of categories that yield some type of feedback. Surveys are

customized to your brand's specifications.



 **Did you know?** You can export any report by clicking on the **More Options** link of the report that you are viewing.

Related Topics

[Sales Reports](#)

[Inventory Reports](#)

[Product Mix Reports](#)

[Labor Reports](#)

[Training Reports](#)

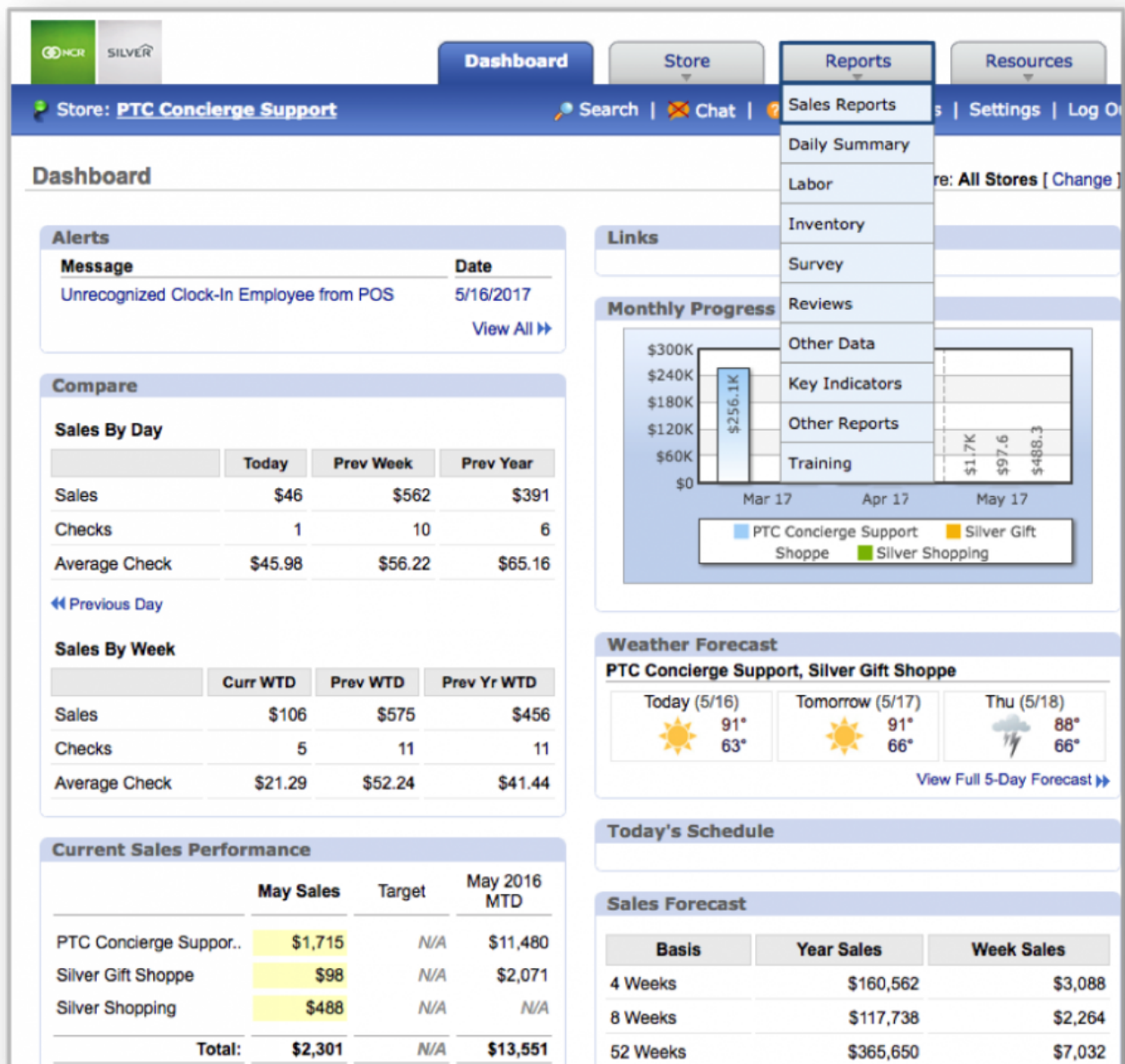
[Survey Reports](#)

Sales Reports

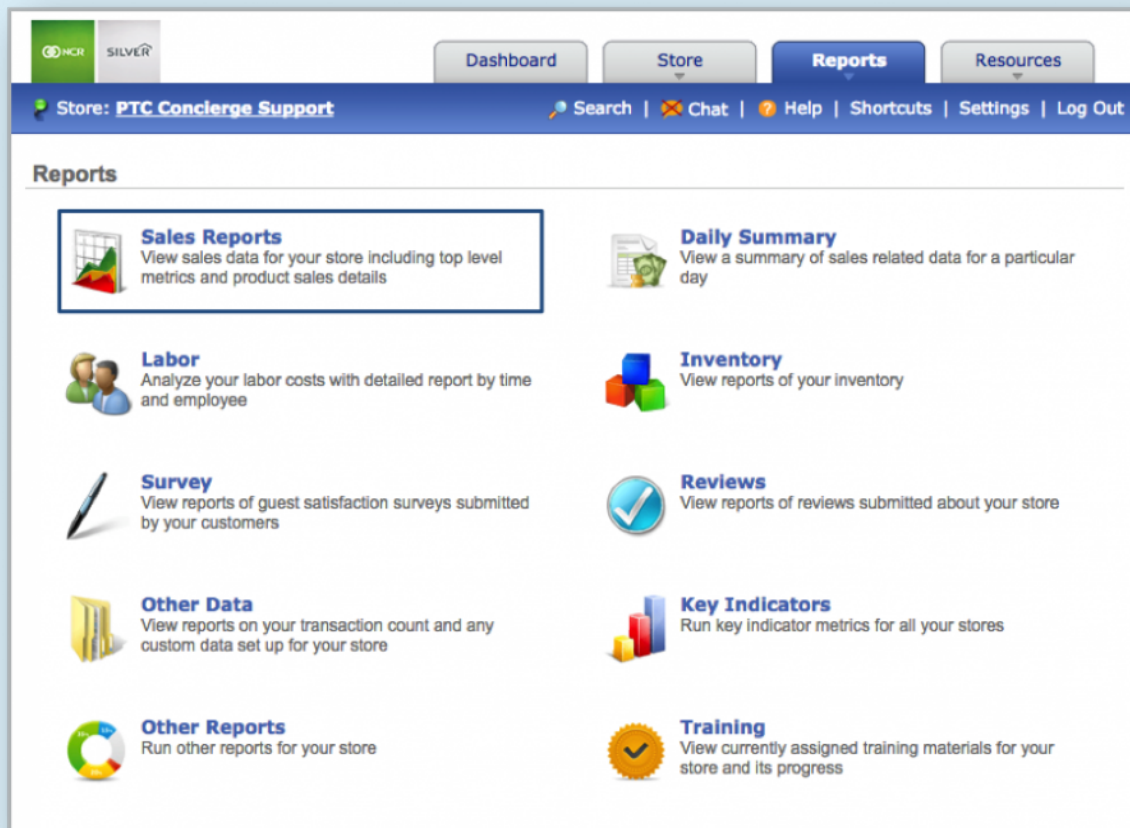
The purpose of this section is to illustrate how to generate a sales report. This section will also focus more specifically on the *Daily Sales Report*. For more detailed information on Hourly, Week Day, Weekly, By Period, Monthly and Yearly reports, click [here](#).

Generate a Sales Report

From your Dashboard view, mouse over the **Reports** tab and click **Sales**.



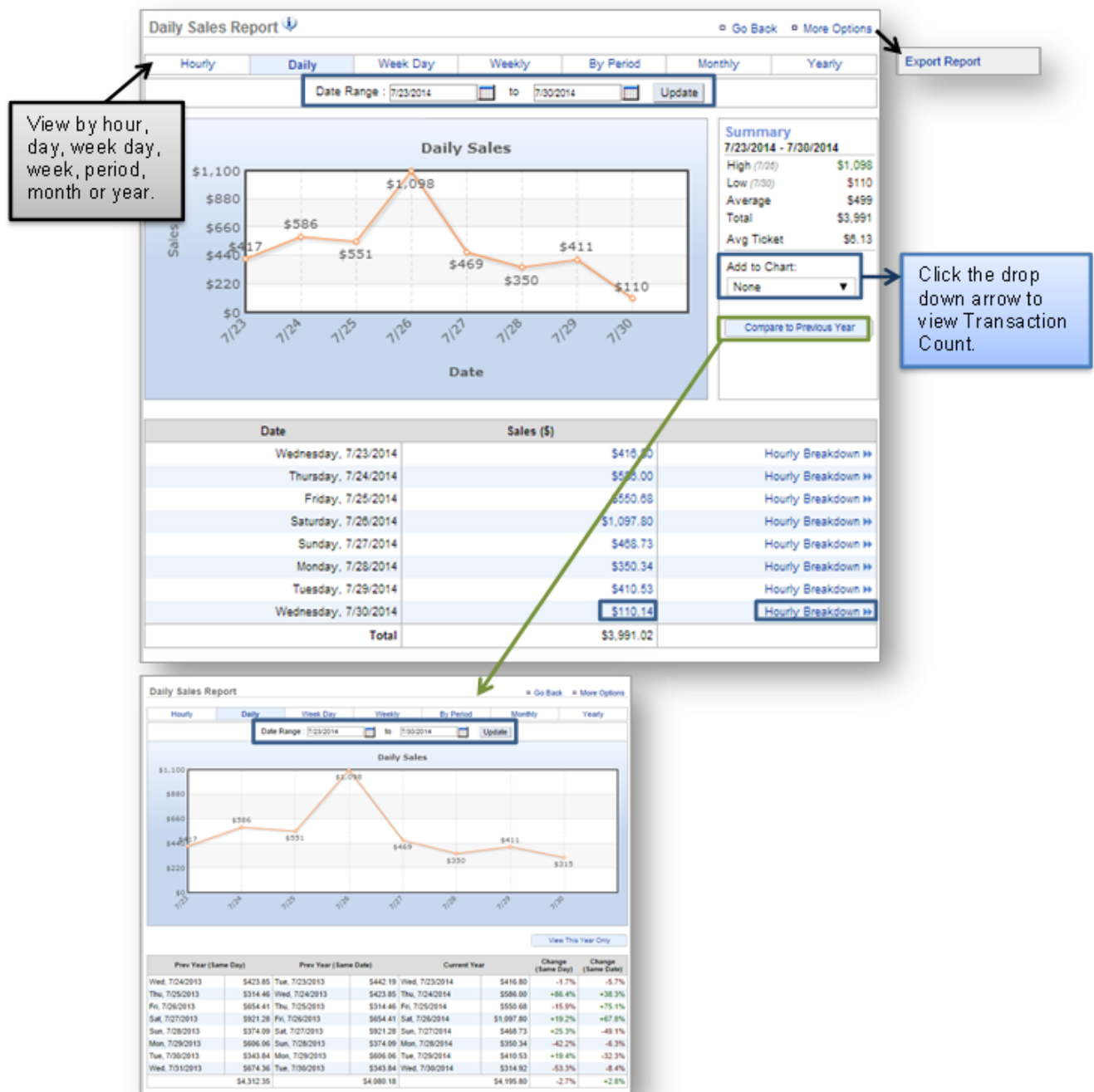
* **Hint:** You can also access the *Sales Report* by clicking on the **Reports** tab and then on **Sales**.



The **Daily Sales Report** will automatically appear on screen. From here you will be able to:

- **Select your view** (e.g. Hourly, Daily, Week Day, Weekly, By Period, Month or Year). To do so, mouse over to your preference at the top of the chart and click it.
- **Select your date range.** Enter your preferred date range just above the chart and click **Update**.
- **View by Transaction Count.** To the right of your chart, click the drop down arrow beneath **Add to Chart** and select **Transaction Count**.
- **Compare sales to previous year.** Click on the **Compare Sales to Previous Year** link to see a comparison.
- **View individual transactions for a specified period of time.** Click on any sales figure within the chart detail section to see a breakdown of individual transactions within a specified period of time.
- **View an hourly breakdown of sales.** Click **Hourly Breakdown** to the right of any sales figure in the chart detail section to see the hourly breakdown of sales for a specific day.

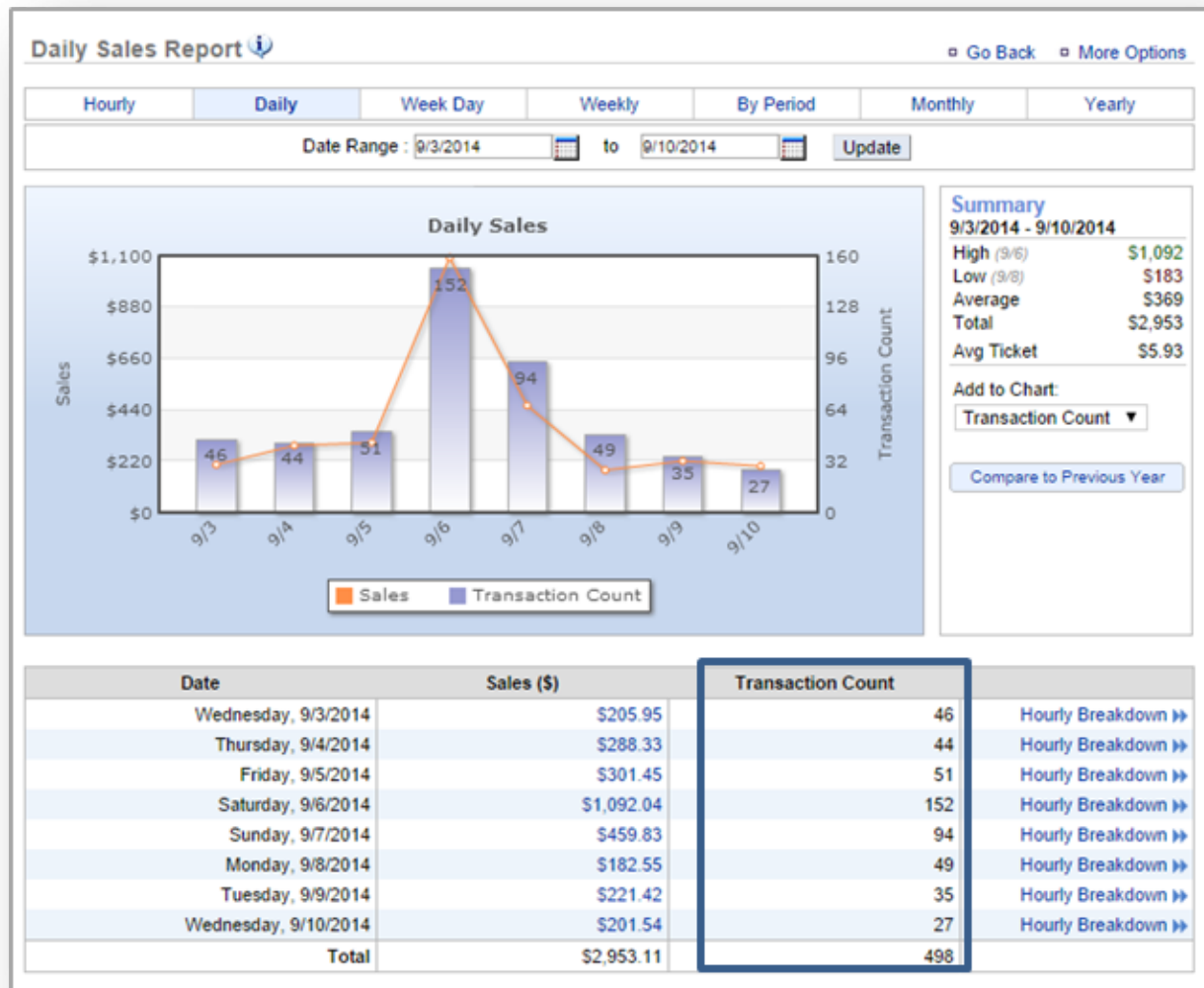
- **Export your sales data.** Click **More Options** at the top right corner and then **Export Report**.



Transaction Count Report

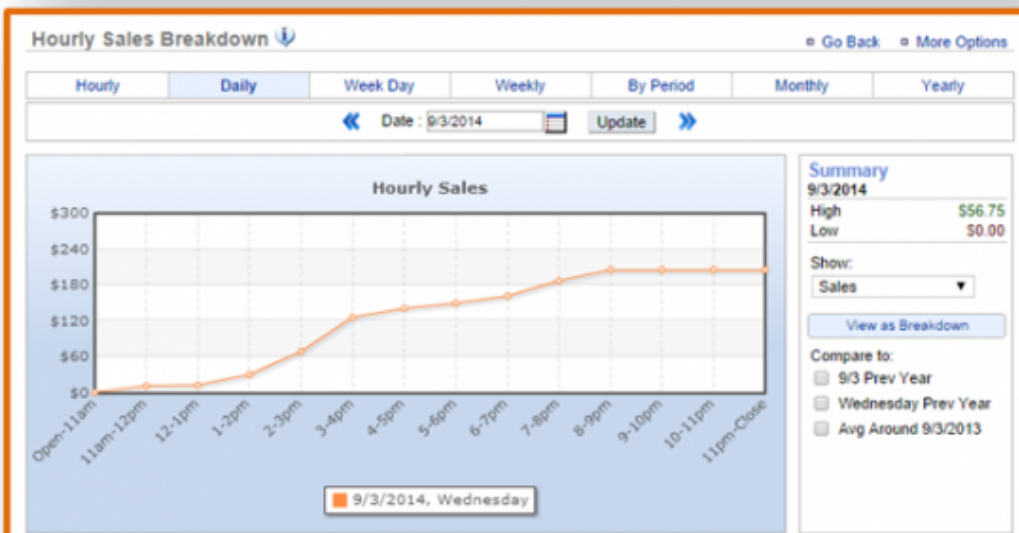
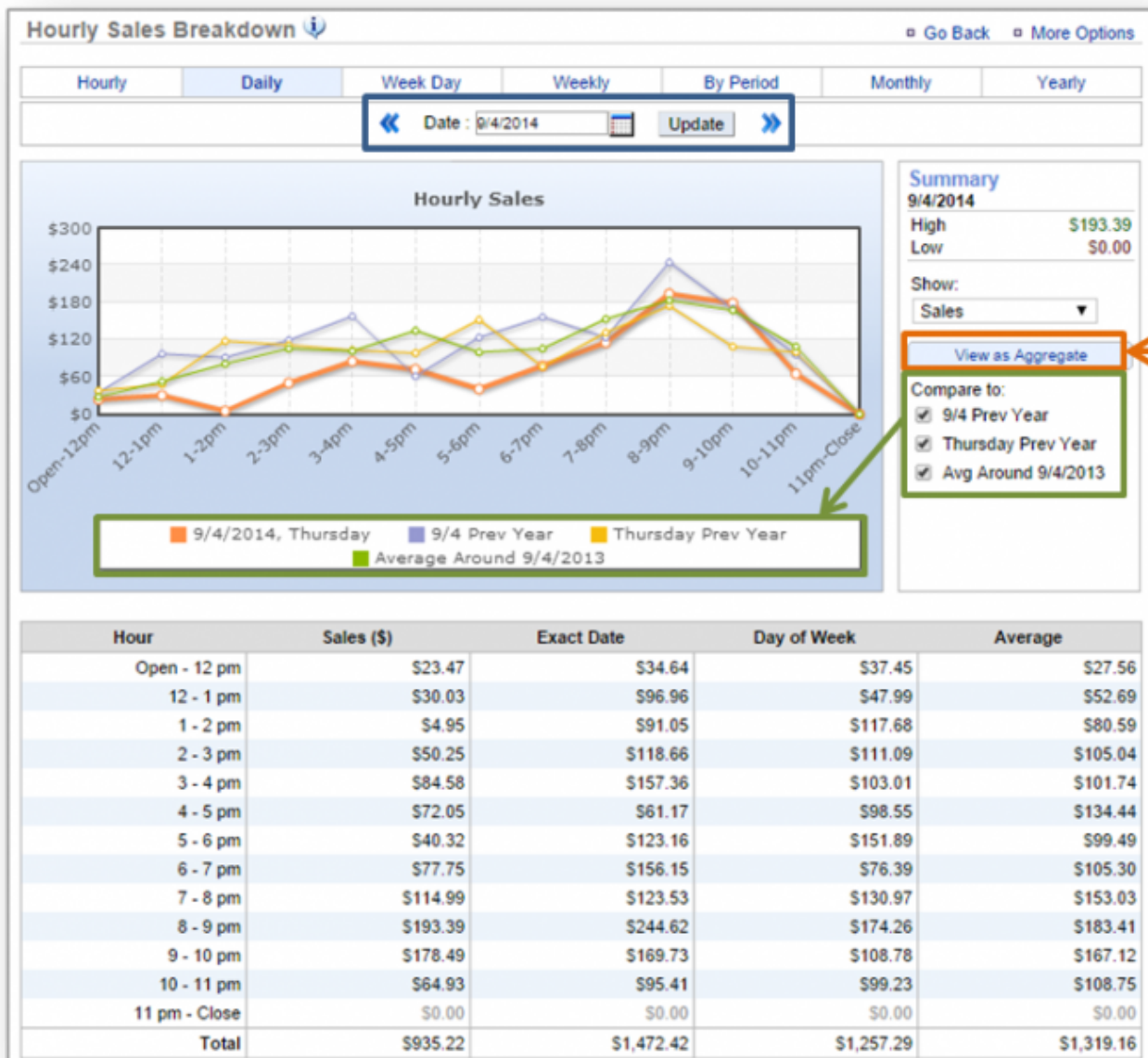
When you select the option to view a sales report by **Transaction Count**, transaction counts will appear with sales information on the chart and within the chart detail section below. You can also access individual

transactions and the hourly breakdowns from this screen.



Hourly Breakdown

When viewing the *Hourly Sales Breakdown*, you will have the option to compare those sales against sales of the same date of the previous year, the same week day of the previous year, and/or the average around the same day of the previous year. You will also be able to view your data as an aggregate; which tracks sales growth throughout the day.



Related Topics[**Additional Sales Reports**](#)[**Inventory Reports**](#)[**Product Mix Reports**](#)[**Labor Reports**](#)[**Training Reports**](#)[**Survey Reports**](#)

Additional Sales Reports

The purpose of this section is to showcase the additional reports within the Sales Report category. Click on a report below for more detailed information.

[Hourly Sales Report](#)

[Week Day Sales Report](#)

[Weekly Sales Report](#)

[By Period Sales Report](#)

[Monthly Sales Report](#)

[Yearly Sales Report](#)

Hourly Report

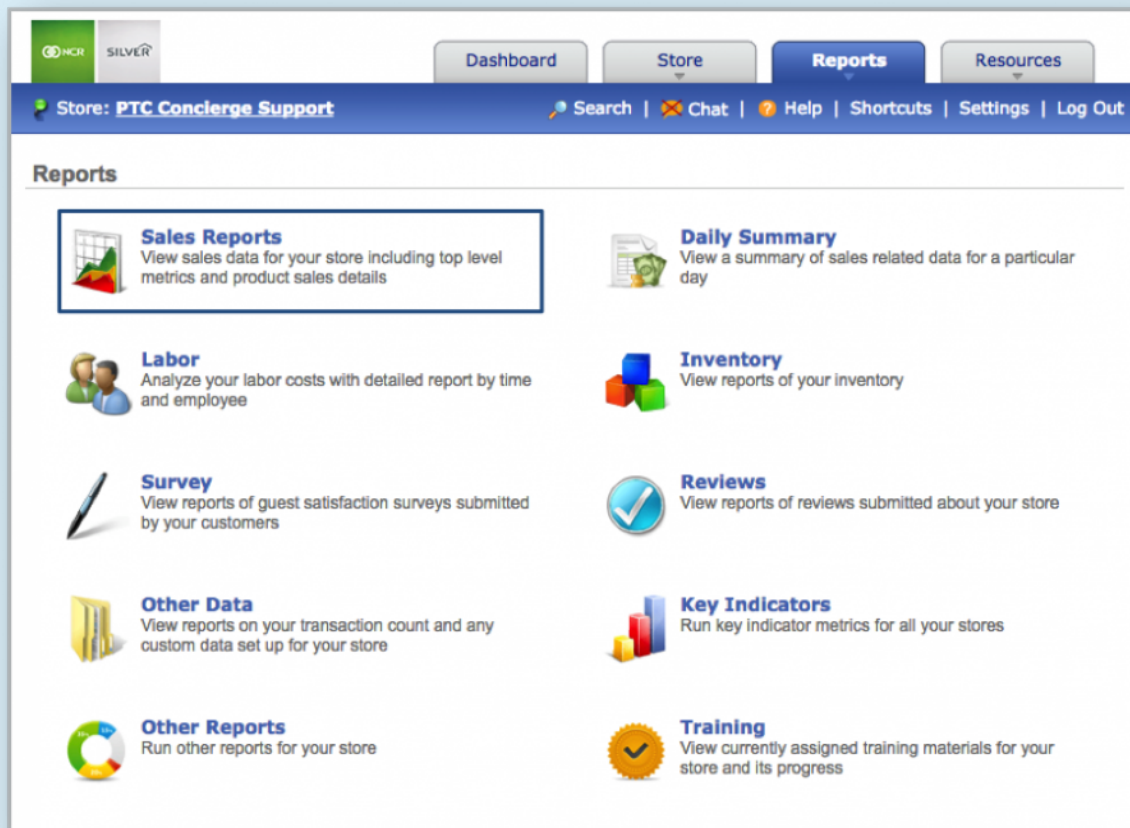
The purpose of this section is to showcase the *Hourly Sales Report* category.

Hourly Sales Report

STEP 1: From your Dashboard view, mouse over the **Reports** tab and click **Sales**.



* **Hint:** You can also access the *Sales Report* by clicking on the **Reports** tab and then on **Sales**.

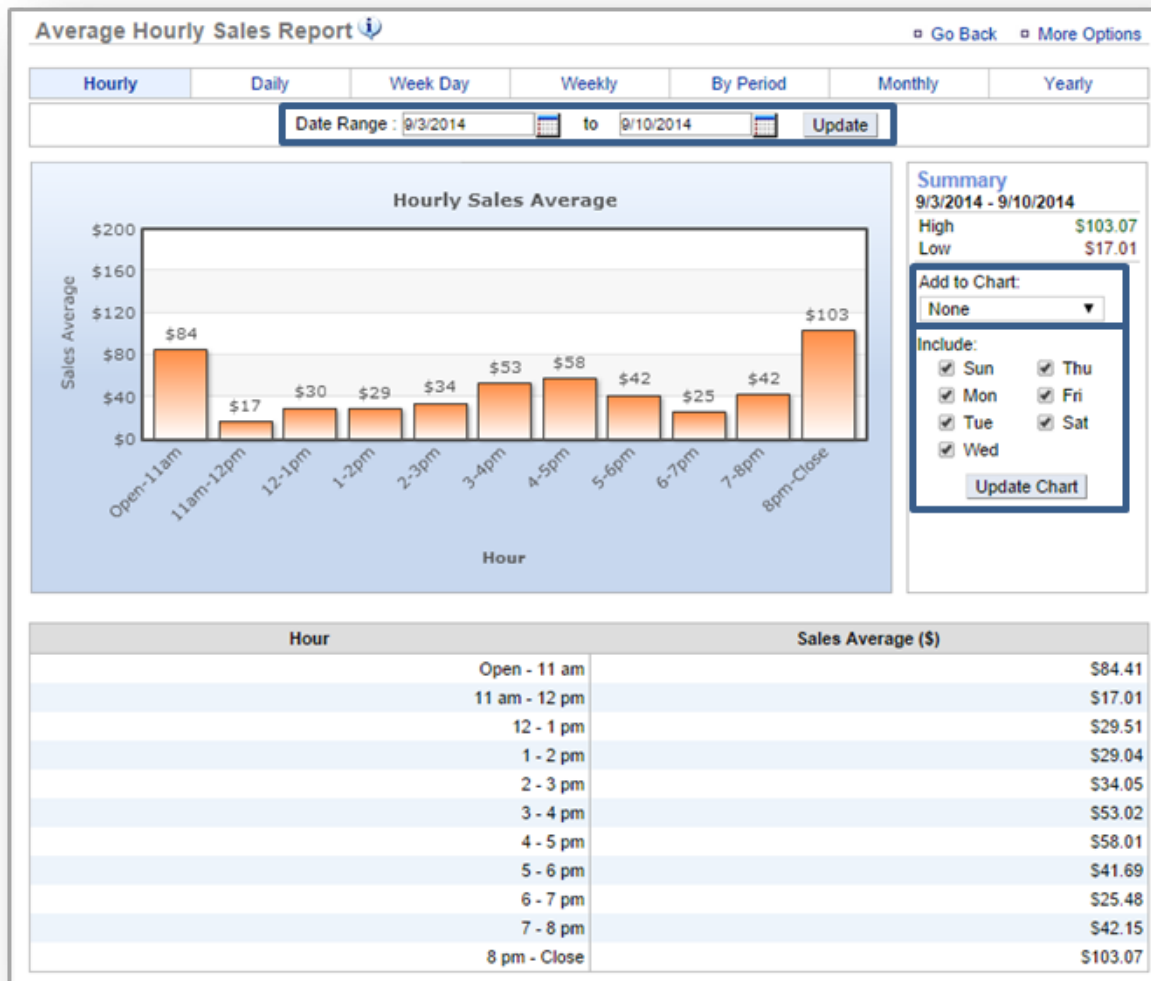


STEP 2: The **Daily Sales Report** will automatically appear on screen. To select the hourly report view, mouse over to the **Hourly** tab at the top of the chart and click it.

The *Hourly Sales Report* will provide you with sales information during specified times of day within the date range you set. When viewing this report, you will have the option to:

- **Select your date range.** Enter your preferred date range just above the chart and click **Update**.
- **View by Transaction Count.** To the right of your chart, click the drop down arrow beneath **Add to Chart** and select **Transaction Count**.
- **Specify the day(s) of the week you wish to view.** To do so, un-check those days you wish to remove from view and click **Update**.

- **Export your sales data.** Click **More Options** at the top right corner and then **Export Report**.



Related Topics

[Daily Sales Report](#)

[Week Day Sales Report](#)

[Weekly Sales Report](#)

[By Period Sales Report](#)

[Monthly Sales Report](#)

[Yearly Sales Report](#)

Week Day Report

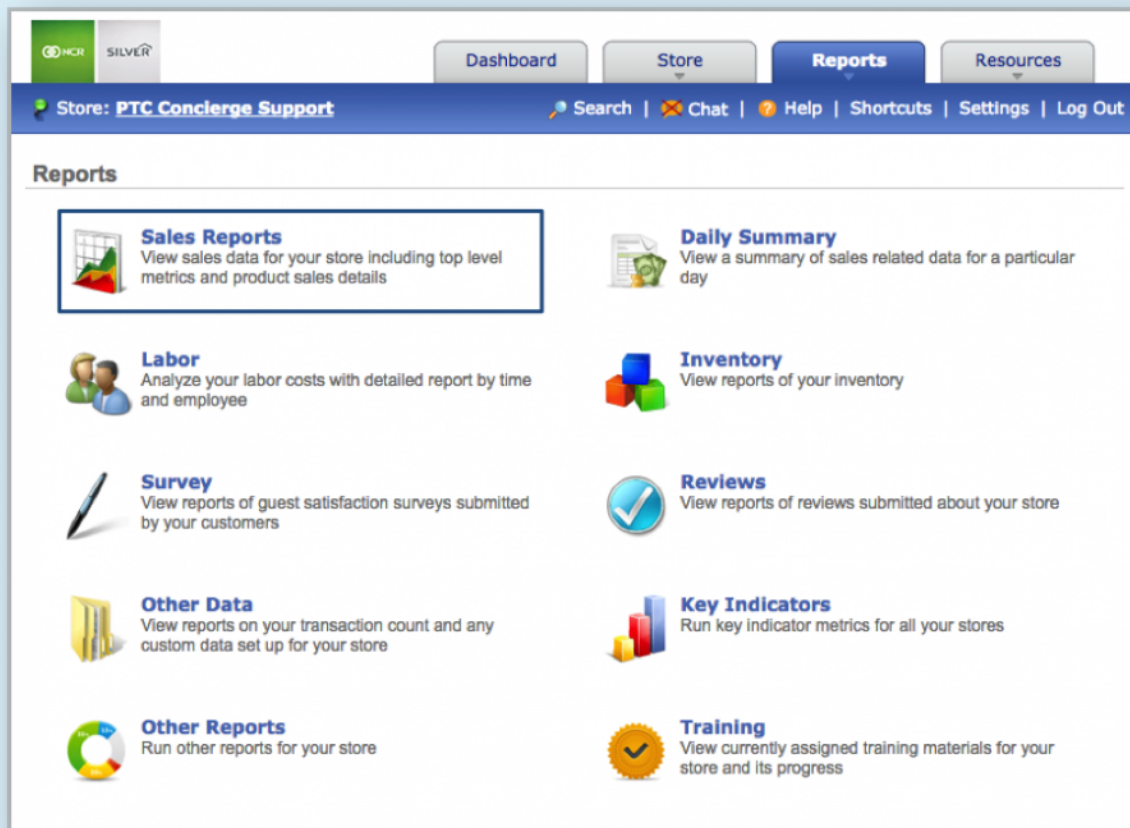
The purpose of this section is to showcase the *Week Day Sales Report* category.

Week Day Sales Report

STEP 1: From your Dashboard view, mouse over the **Reports** tab and click **Sales**.



* **Hint:** You can also access the *Sales Report* by clicking on the **Reports** tab and then on **Sales**.

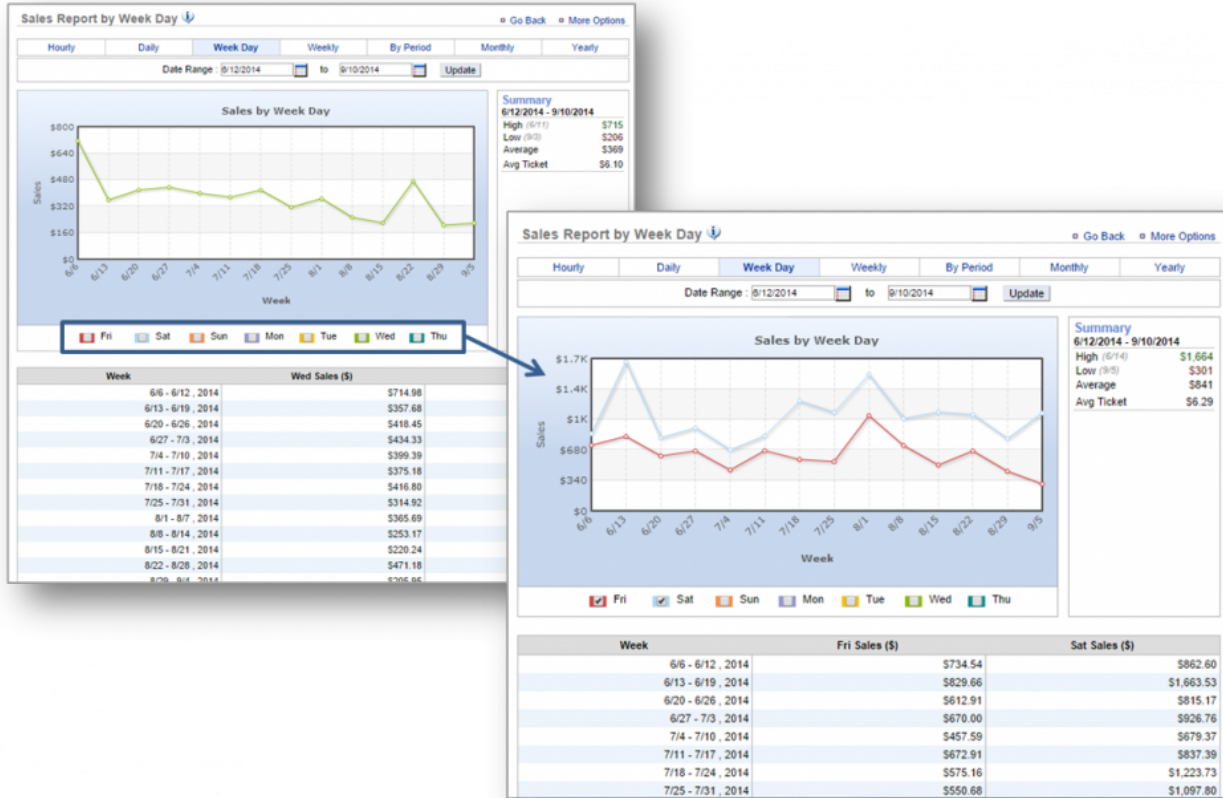


STEP 2: The **Daily Sales Report** will automatically appear on screen. To select the week day report view, mouse over to the **Week Day** tab at the top of the chart and click it.

The *Week Day Report* will provide you with sales information for each day of the week within the date range you set. When viewing this report, you will have the option to:

- **Select your date range.** Enter your preferred date range just above the chart and click **Update**.
- **Specify the day(s) of the week you wish to view.** To do so, check those days at the bottom of your chart that you wish to add to your view.

- **Export your sales data.** Click **More Options** at the top right corner and then **Export Report**.



Related Topics

[Daily Sales Report](#)

[Weekly Sales Report](#)

[By Period Sales Report](#)

[Monthly Sales Report](#)

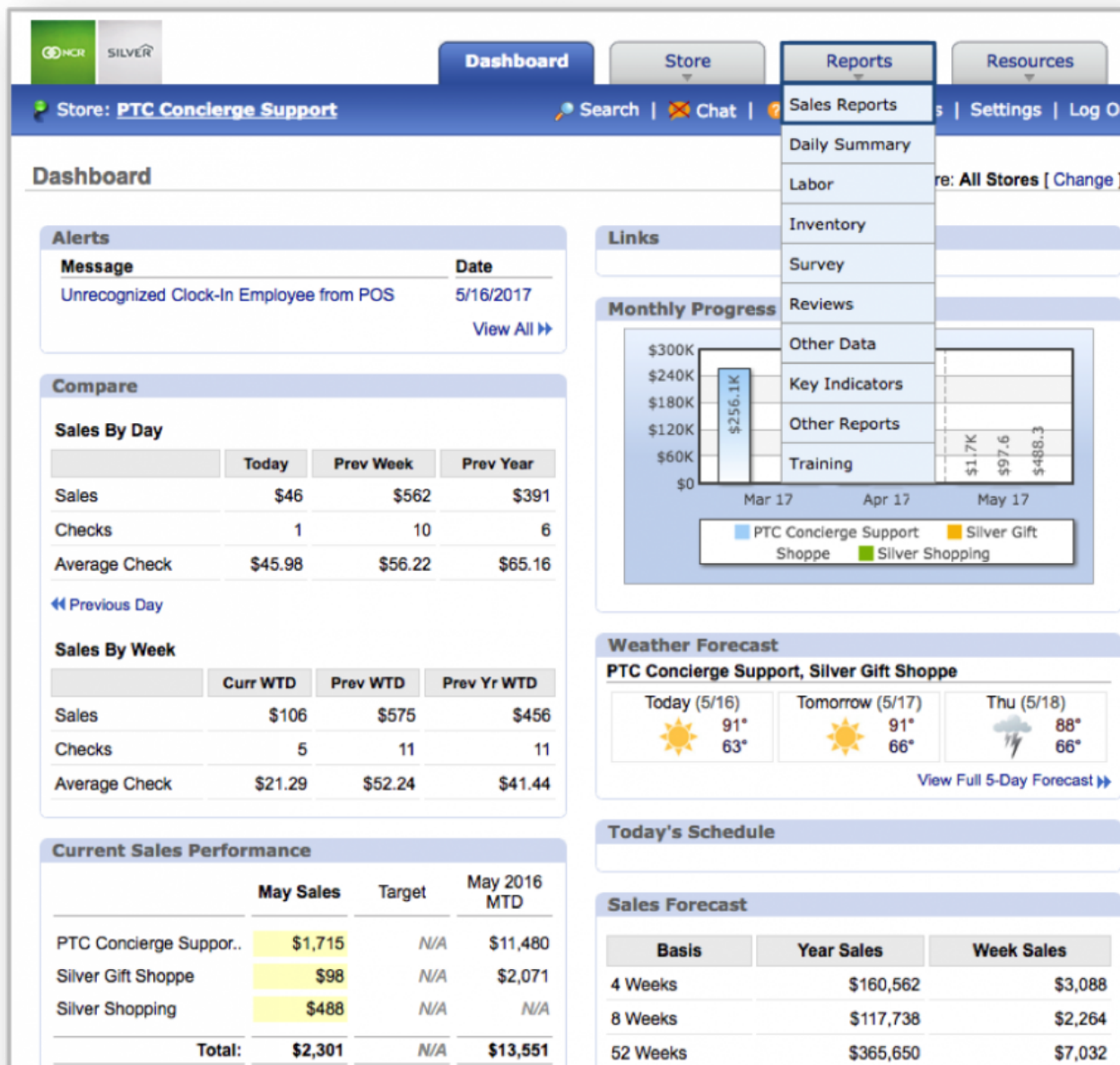
[Yearly Sales Report](#)

Weekly Report

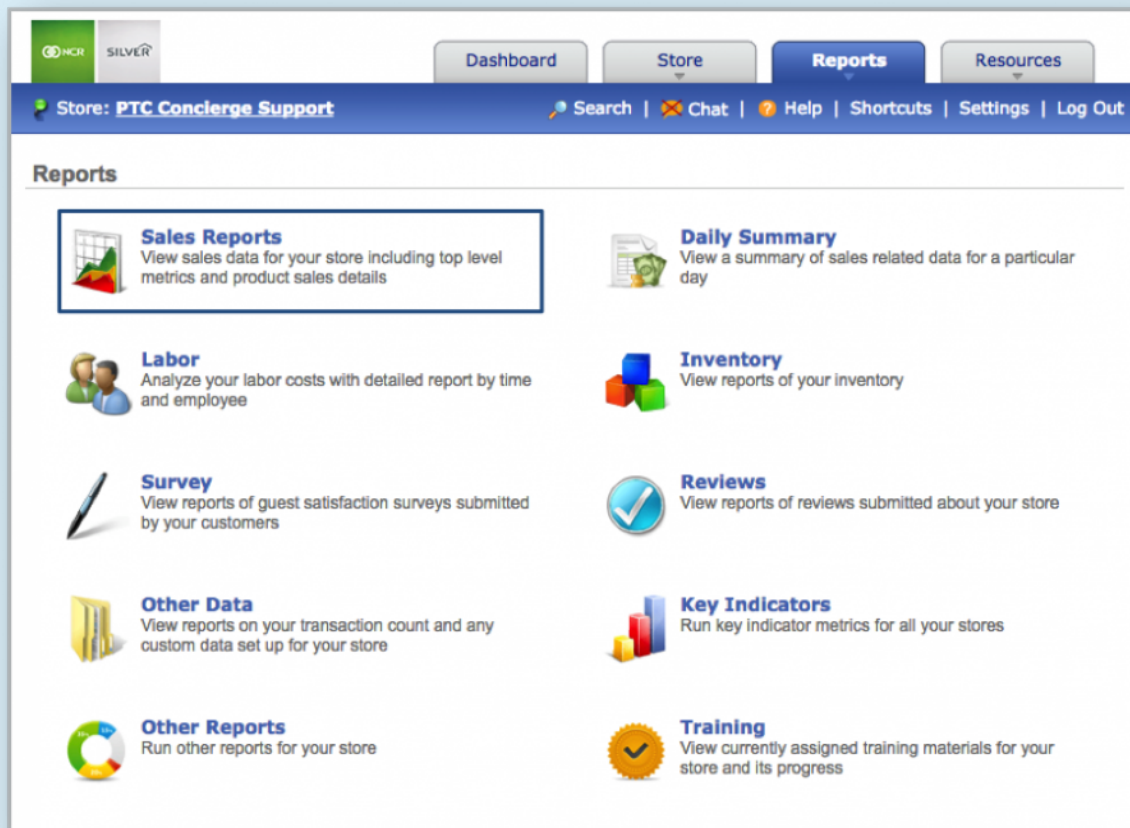
The purpose of this section is to showcase the *Weekly Sales Report* category.

Weekly Sales Report

STEP 1: From your Dashboard view, mouse over the **Reports** tab and click **Sales**.



* **Hint:** You can also access the *Sales Report* by clicking on the **Reports** tab and then on **Sales**.

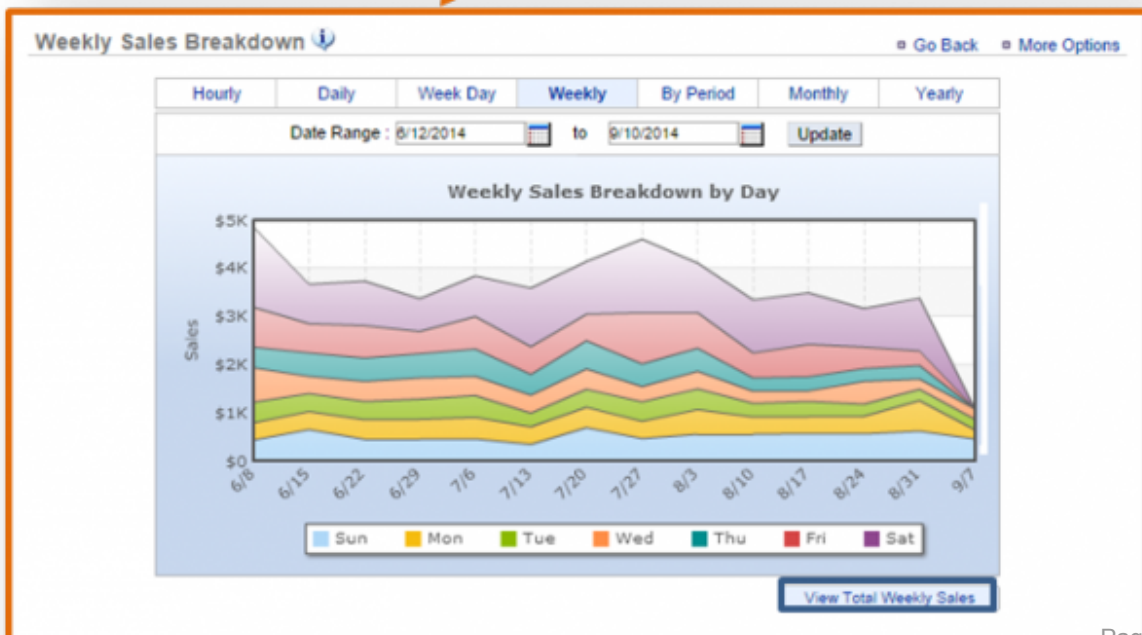
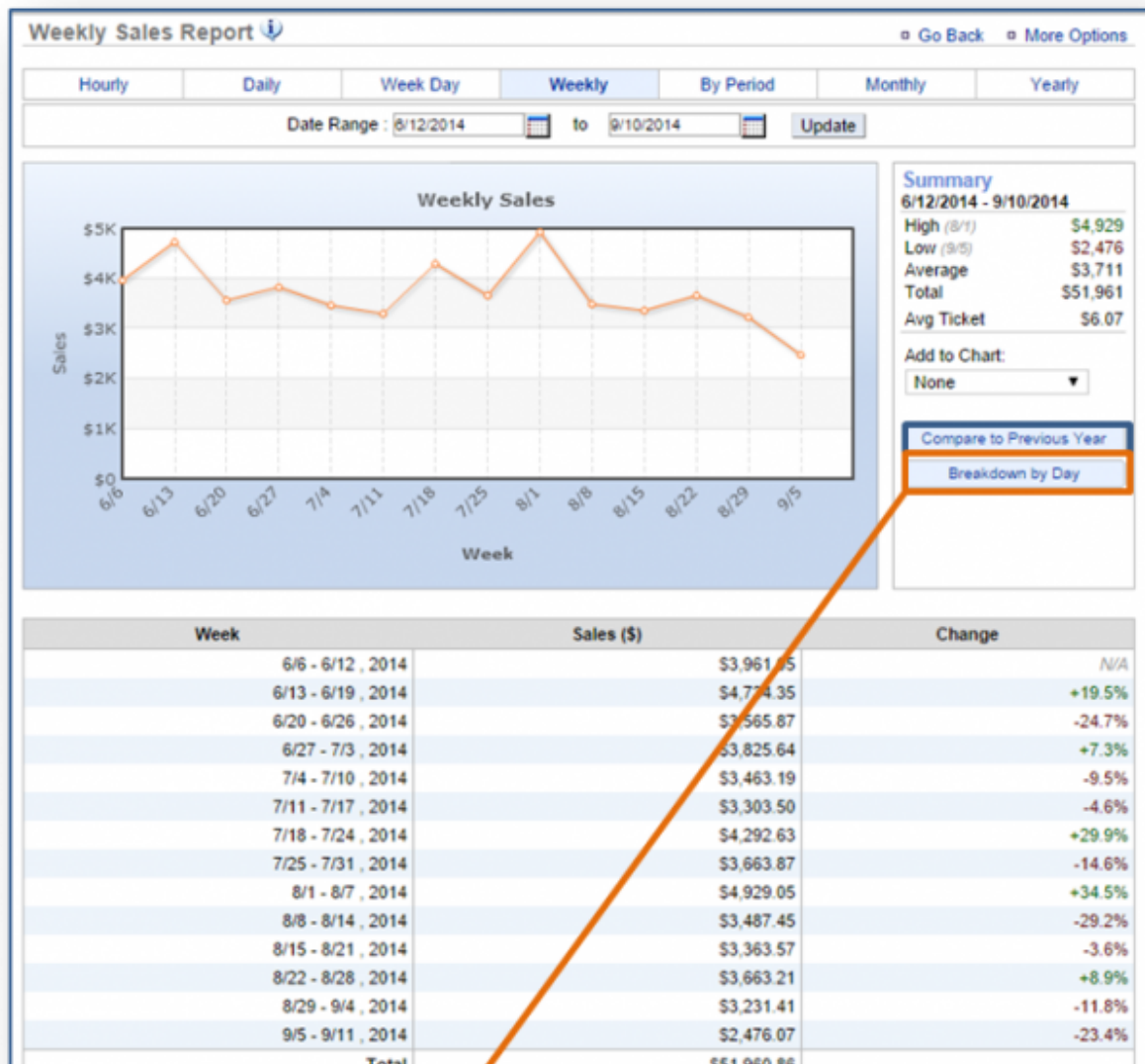


STEP 2: The **Weekly Sales Report** will automatically appear on screen. To select the weekly report view, mouse over to the **Weekly** tab at the top of the chart and click it.

The *Weekly Report* will provide you with sales information for each week within the date range you set. When viewing this report, you will have the option to:

- **Select your date range.** Enter your preferred date range just above the chart and click **Update**.
- **Compare sales to previous year.** Click on the **Compare Sales to Previous Year** link to see a comparison.
- **View breakdown by day.** Click **Breakdown by Day** to the right of the chart to see the breakdown by day.

- **Export your sales data.** Click ***More Options*** at the top right corner and then ***Export Report***.



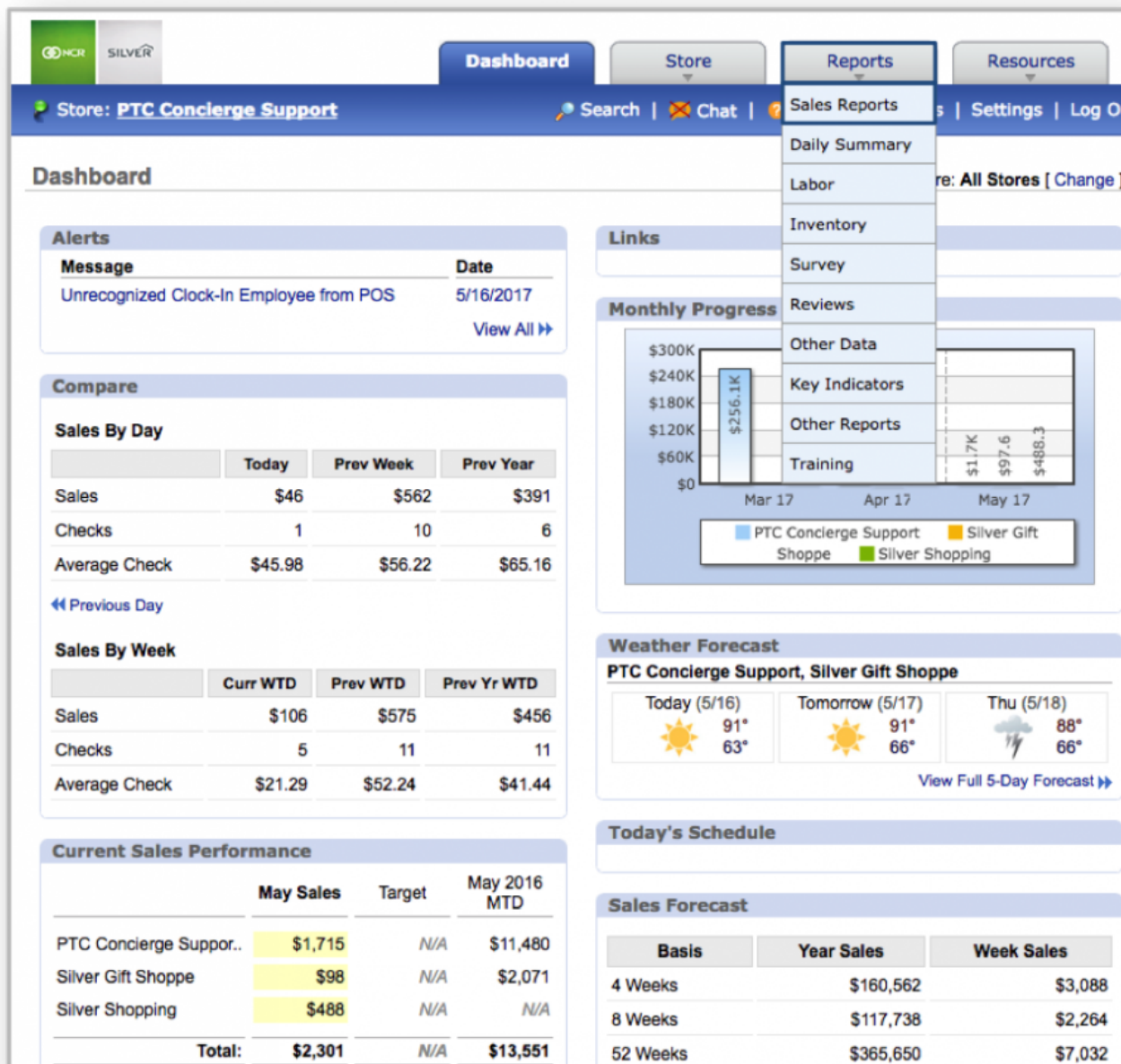
Related Topics[Daily Sales Report](#)[Week Day Sales Report](#)[By Period Sales Report](#)[Monthly Sales Report](#)[Yearly Sales Report](#)

By Period Report

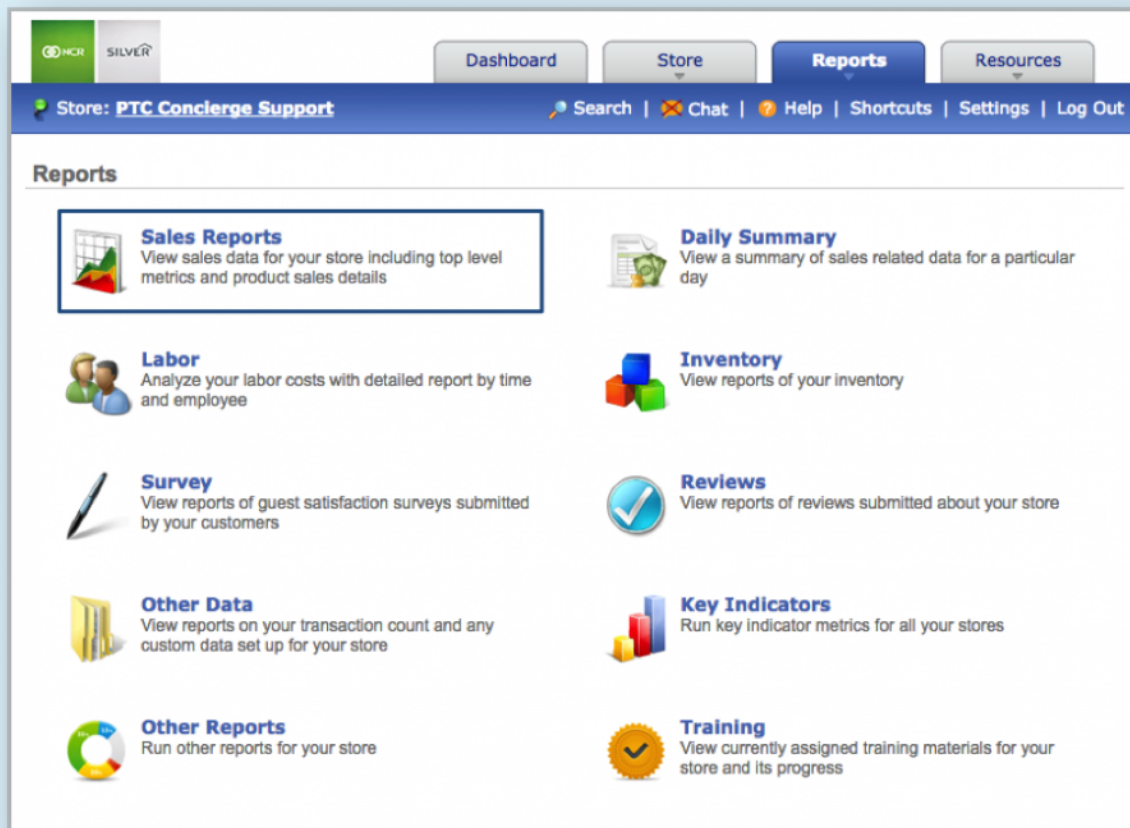
The purpose of this section is to showcase the *By Period Sales Report* category.

By Period Sales Report

STEP 1: From your Dashboard view, mouse over the **Reports** tab and click **Sales**.



* **Hint:** You can also access the *Sales Report* by clicking on the **Reports** tab and then on **Sales**.

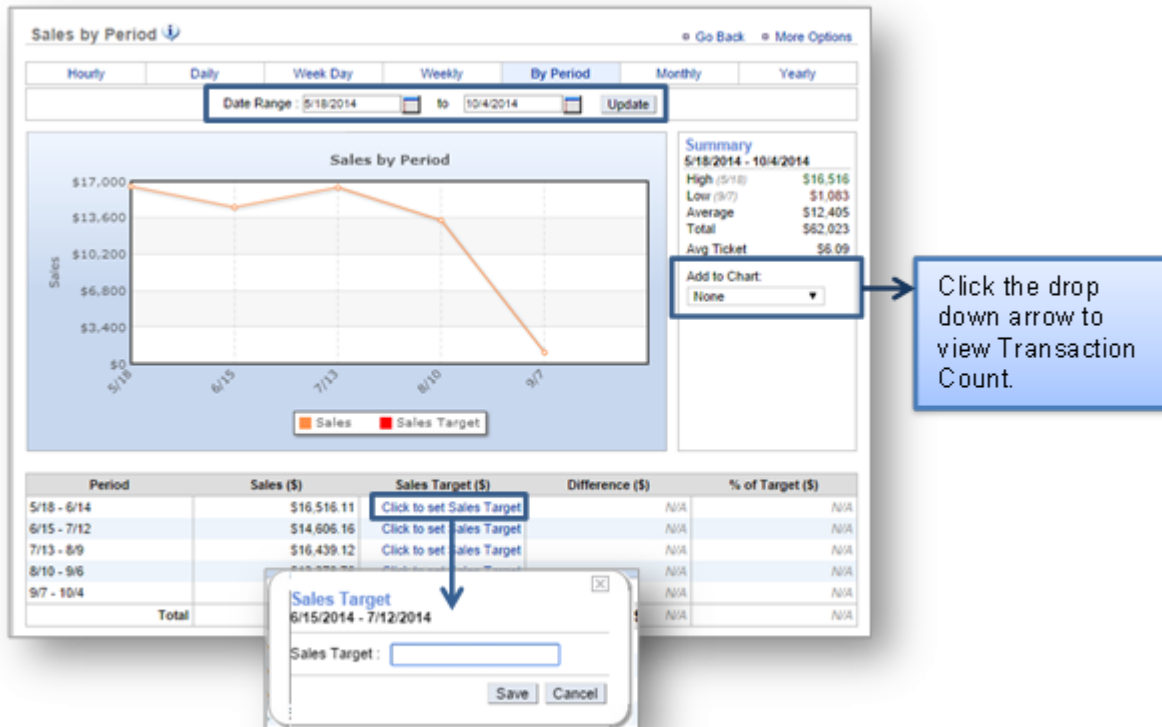


STEP 2: The **Daily Sales Report** will automatically appear on screen. To select the by period report view, mouse over to the **By Period** tab at the top of the chart and click it.

The *By Period Report* will provide you with sales information for each period within your fiscal calendar and for the date range you set. When viewing this report, you will have the option to:

- **Select your date range.** Enter your preferred date range just above the chart and click **Update**.
- **View by Transaction Count.** To the right of your chart, click the drop down arrow beneath *Add to Chart* and select **Transaction Count**.
- **Set a sales target.** Click **Click to set Sales Target** to the right of any period to enter your target. Click **Save** when done.

- **Export your sales data.** Click **More Options** at the top right corner and then **Export Report**.



Related Topics

[Daily Sales Report](#)

[Week Day Sales Report](#)

[Weekly Sales Report](#)

[Monthly Sales Report](#)

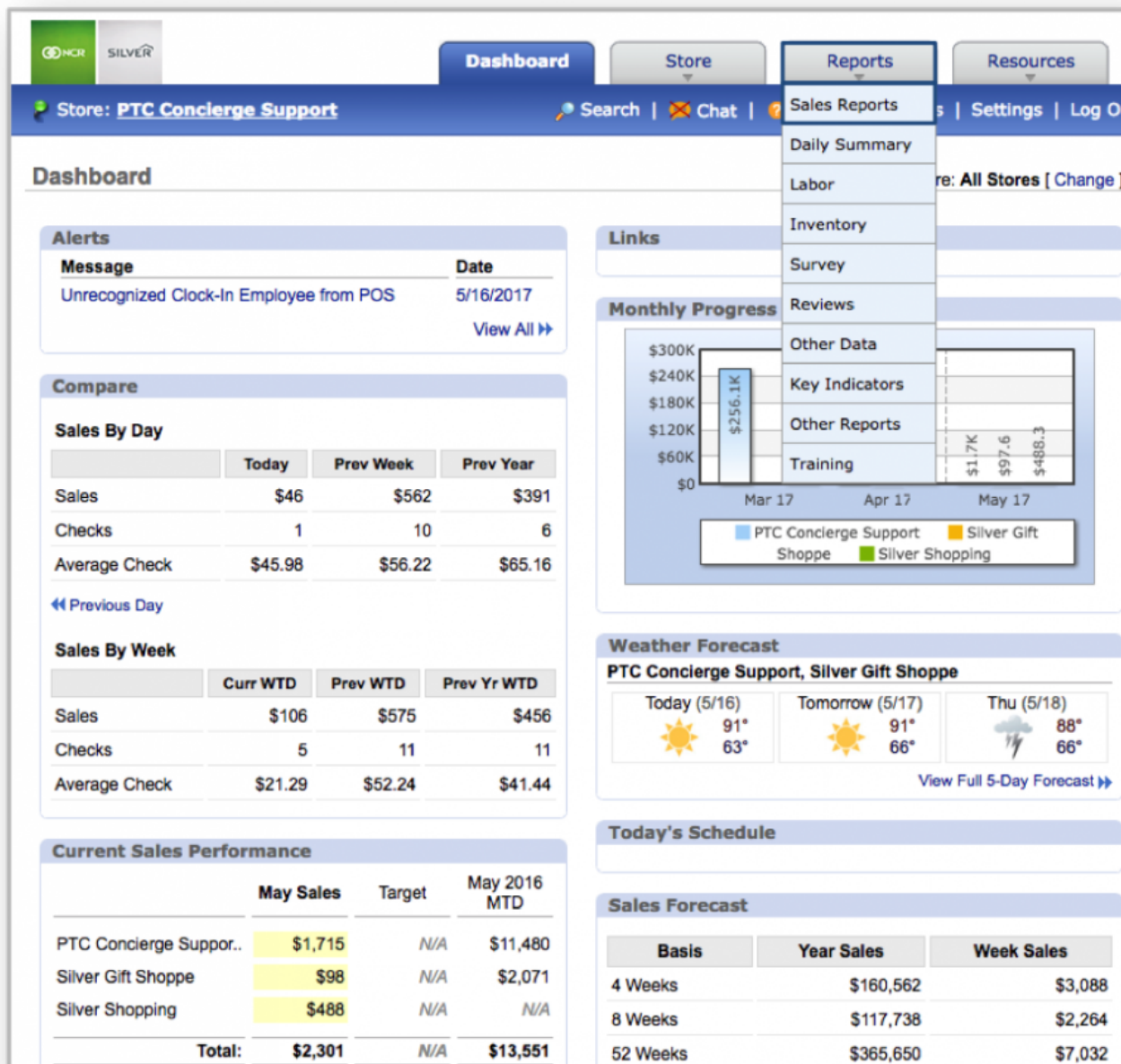
[Yearly Sales Report](#)

Monthly Report

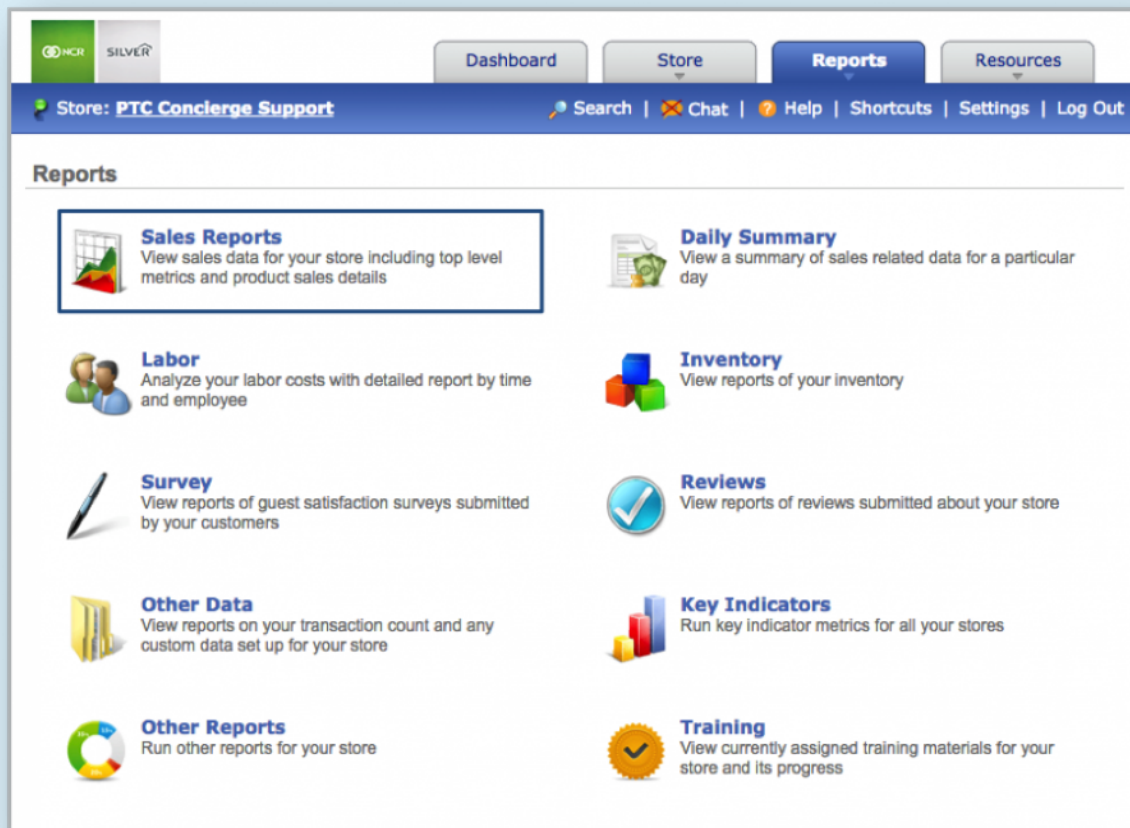
The purpose of this section is to showcase the *Monthly Sales Report* category.

Monthly Sales Report

STEP 1: From your Dashboard view, mouse over the **Reports** tab and click **Sales**.



* **Hint:** You can also access the *Sales Report* by clicking on the **Reports** tab and then on **Sales**.

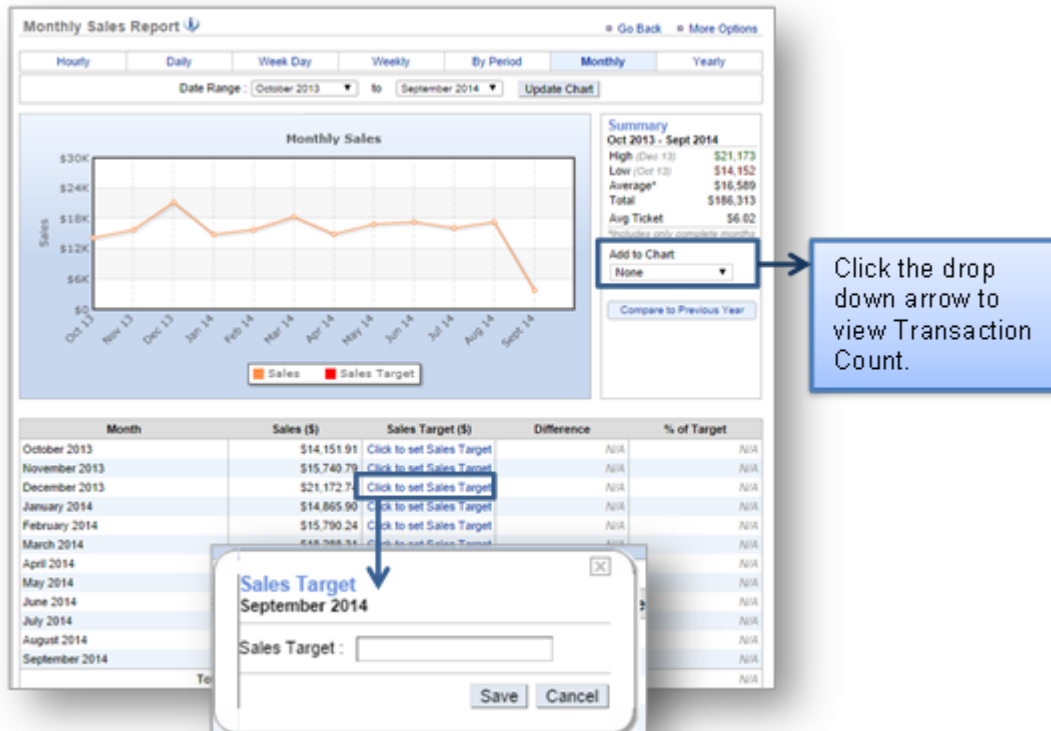


STEP 2: The **Monthly Sales Report** will automatically appear on screen. To select the monthly report view, mouse over to the **Monthly** tab at the top of the chart and click it.

The *Monthly Report* will provide you with sales information for each month within the date range you set. When viewing this report, you will have the option to:

- **Select your date range.** Enter your preferred date range just above the chart and click **Update**.
- **View by Transaction Count.** To the right of your chart, click the drop down arrow beneath *Add to Chart* and select **Transaction Count**.
- **Set a sales target.** Click **Click to set Sales Target** to the right of any period to enter your target. Click **Save** when done.

- **Export your sales data.** Click **More Options** at the top right corner and then **Export Report**.



Related Topics

[Daily Sales Report](#)

[Week Day Sales Report](#)

[Weekly Sales Report](#)

[By Period Sales Report](#)

[Yearly Sales Report](#)

Yearly Report

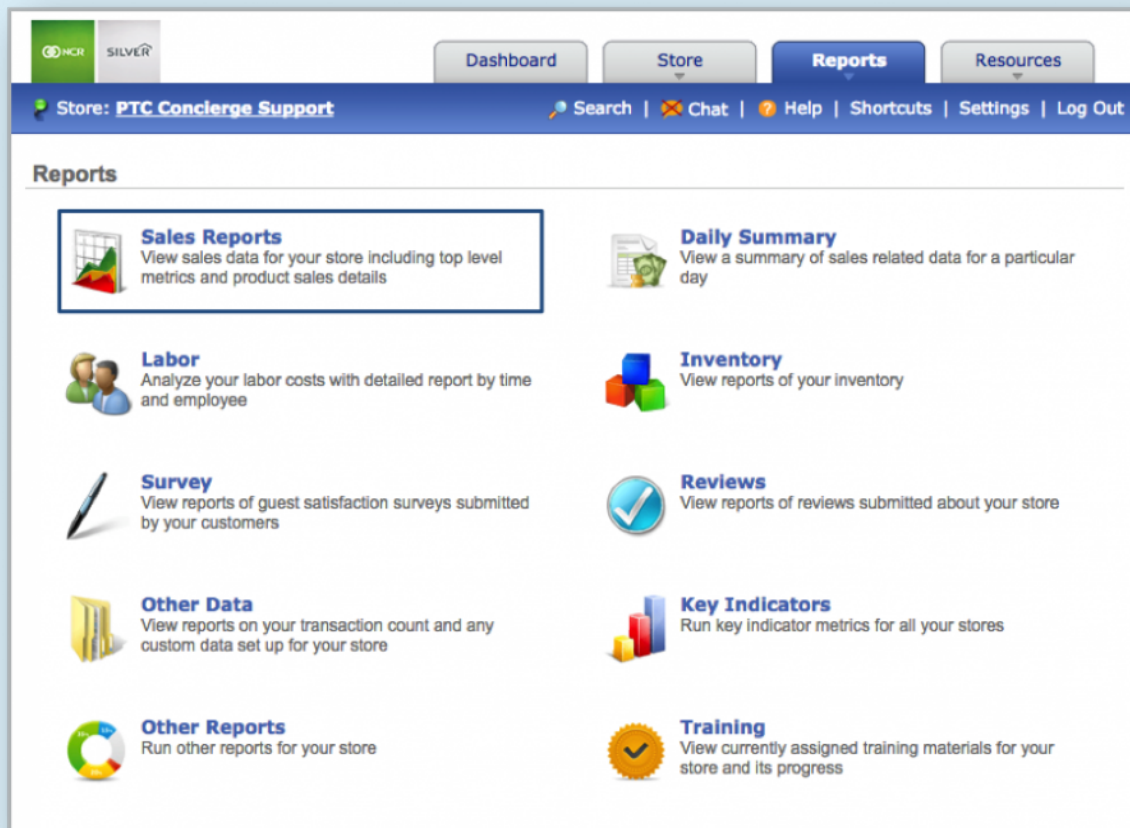
The purpose of this section is to showcase the **Yearly Sales Report** category.

Yearly Sales Report

STEP 1: From your Dashboard view, mouse over the **Reports** tab and click **Sales**.



* **Hint:** You can also access the *Sales Report* by clicking on the **Reports** tab and then on **Sales**.

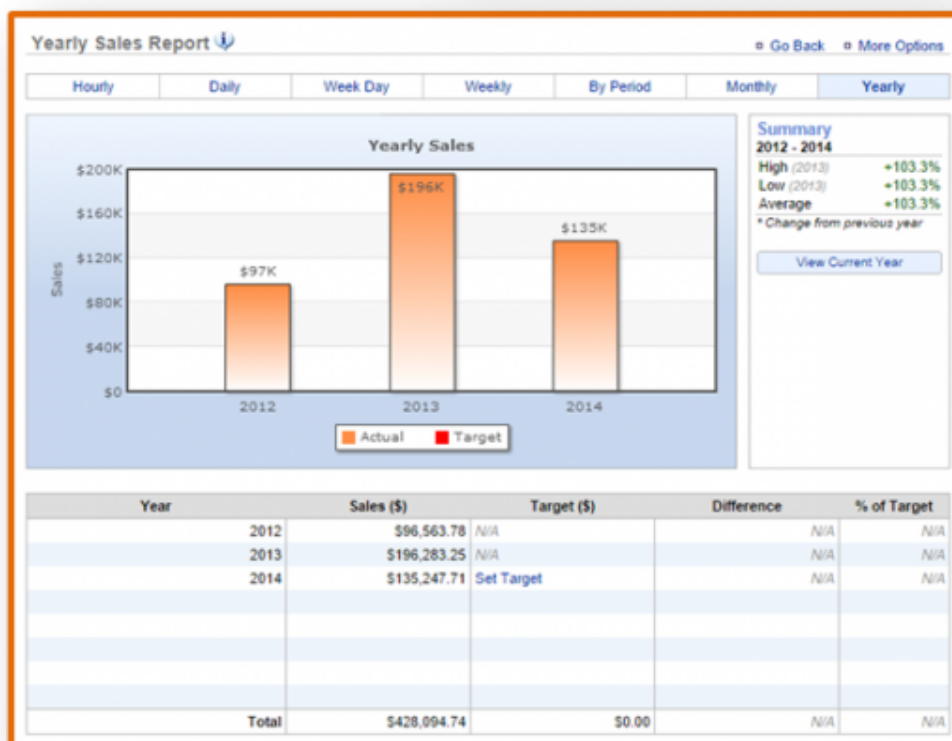
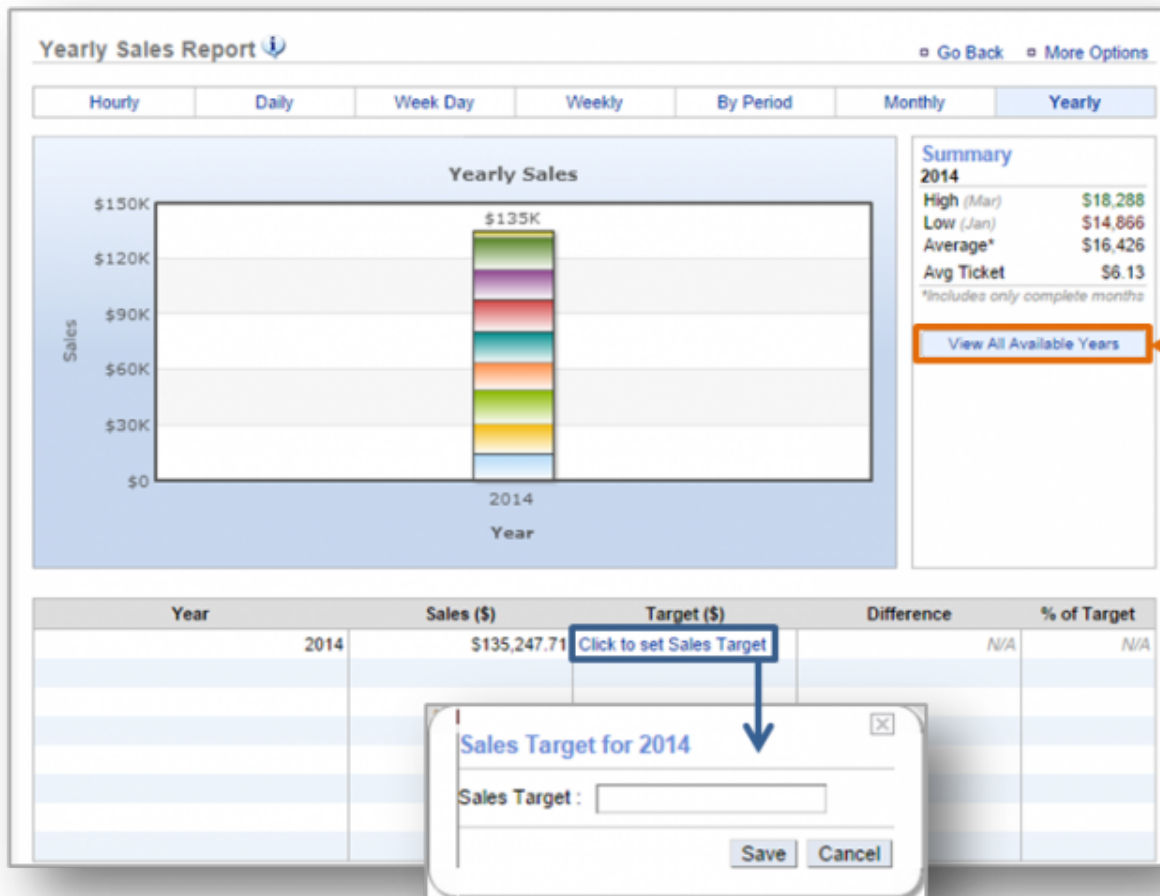


STEP 2: The **Daily Sales Report** will automatically appear on screen. To select the yearly report view, mouse over to the **Yearly** tab at the top of the chart and click it.

The **Yearly Report** will provide you with sales information for the year and within the date range you set. When viewing this report, you will have the option to:

- **Select your date range.** Enter your preferred date range just above the chart and click **Update**.
- **View sales for all available years.** To the right of your chart, click the *View All Available Years* link.
- **Set a sales target.** Click **Click to set Sales Target** to the right of any period to enter your target. Click **Save** when done.

- **Export your sales data.** Click ***More Options*** at the top right corner and then ***Export Report***.



Related Topics[Daily Sales Report](#)[Week Day Sales Report](#)[Weekly Sales Report](#)[By Period Sales Report](#)[Monthly Sales Report](#)

Modifier Sales Report

In this module, you will learn:

- How to navigate within the **Modifier** report

Modifier Report


To access the **Modifier** report you will need to navigate to the **Reports** module and click **Sales Reports**.




Navigating to the Modifier Report

1. Click **Modifier Report**


Sales Reports




Sales
View your sales report over by any time period for better analysis



Product Mix
View break-down of your products by category or department sold in any given period of time

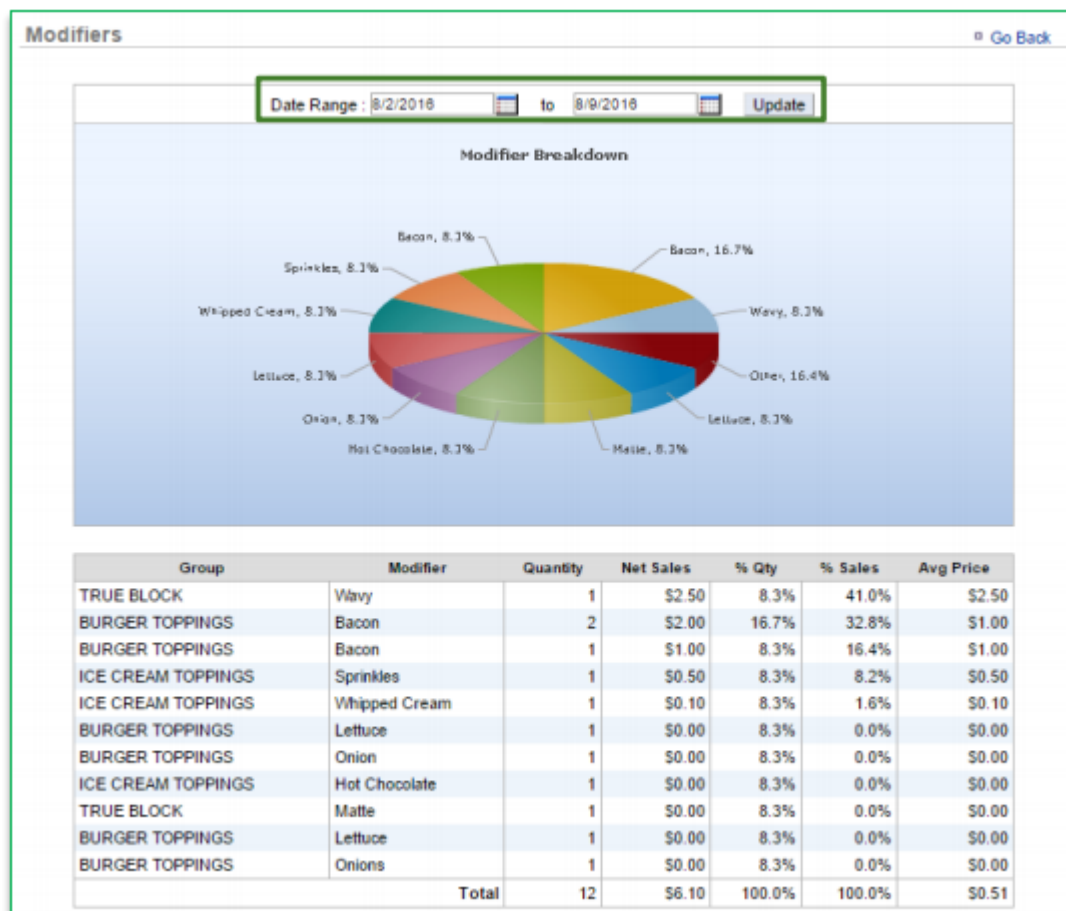


Modifier Report
View a detailed summary and breakdown of item modifiers used in your sales transactions



Item Sales By Employee
View a breakdown of items sold by your employees

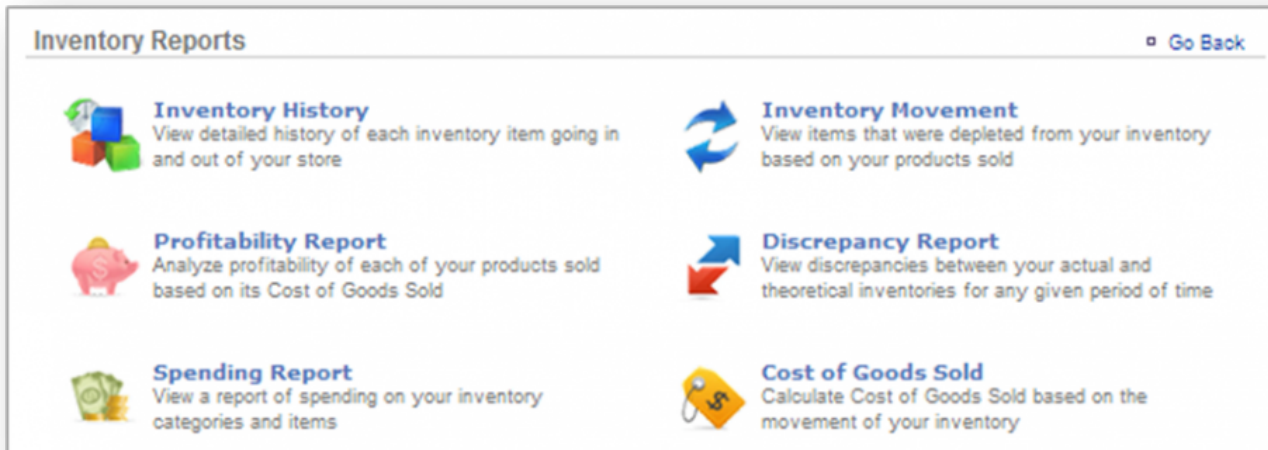
2. This reports defaults to the current day going back one week
3. Enter the desired date range
4. Click **Update**



- [Click here to see the full details](#)

Inventory Reports

Effective inventory management can help to reduce cost of goods (COGs) by quickly managing your inventory through the CimpleBox platform. The inventory reporting feature is meant to aide you in those efforts!



In this section you will find the following resources:

[Inventory History](#)

[Profitability Report](#)

[Spending Report](#)

[Inventory Movement](#)

[Discrepancy Report](#)

[Cost of Goods Sold](#)

For more on Inventory Management:

[Add Inventory:](#) How to add inventory.

[Take Inventory:](#) How to take inventory.

[How to Hide or Display Items:](#) How to hide or display inventory items.

[Manage Inventory:](#) How to manage your inventory in the system.

[How to Select a Unit of Measure:](#) How to select and create a unit of measure.

[Correcting Errors:](#) How to correct errors after you've added or taken inventory.

[How to Export Inventory:](#) How to export your inventory database.

GLOSSARY OF TERMS

- **Add Inventory:** Occurs when you receive an order.
- **Take Inventory:** When you take the inventory of what you have *on hand* the day you take inventory (*which may include recent deliveries*).
- **On Hand:** A snapshot of what you currently have in inventory.
- **Theoretical On Hand:** Uses POS and *Actual* data to determine what you should currently have in inventory. Inventory items must be tied to the POS to determine *Theoretical On Hand* totals.
- **Auto Depletion:** When an item that correlates to a recipe is rung up on the POS, that item will auto-deplete from inventory to give you what you should *actually* have on hand. *Note: the item must be part of a recipe that is also tied to the POS.*
- **Actual Inventory:** Reconciles with Auto Depletion to determine what you have on hand. This occurs when you take inventory.
- **View History:** Provides you with historical data to show how Theoretical On Hand totals were calculated.
- **Cost of Goods (COGs):** The value of goods sold during a particular period of time.
- **Inventory Discrepancy:** Depicts actual vs. ideal inventory.

Inventory History

The purpose of this section is to showcase the *Inventory History Report* category.

Inventory History Report

STEP 1: From your Dashboard view, mouse over the **Reports** tab and click **Inventory**.

The screenshot shows the NCR Silver dashboard for the store "PTC Concierge Support". The "Reports" tab is selected, and the "Inventory" option is highlighted in the dropdown menu. The dashboard includes sections for Alerts, Compare (Sales By Day and Sales By Week), Current Sales Performance, Monthly Progress (a bar chart showing sales for Mar 17, Apr 17, and May 17), Weather Forecast, Today's Schedule, and Sales Forecast.

Alerts

Message	Date
Unrecognized Clock-In Employee from POS	5/16/2017

[View All](#)

Compare

Sales By Day

	Today	Prev Week	Prev Year
Sales	\$46	\$562	\$391
Checks	1	10	6
Average Check	\$45.98	\$56.22	\$65.16

[Previous Day](#)

Sales By Week

	Curr WTD	Prev WTD	Prev Yr WTD
Sales	\$106	\$575	\$456
Checks	5	11	11
Average Check	\$21.29	\$52.24	\$41.44

Current Sales Performance

	May Sales	Target	May 2016 MTD
PTC Concierge Support..	\$1,715	N/A	\$11,480
Silver Gift Shoppe	\$98	N/A	\$2,071
Silver Shopping	\$488	N/A	N/A
Total:	\$2,301	N/A	\$13,551

Monthly Progress

Bar chart showing sales for Mar 17, Apr 17, and May 17. Legend: PTC Concierge Support (blue), Silver Gift Shoppe (yellow), Silver Shopping (green).

Weather Forecast

PTC Concierge Support, Silver Gift Shoppe

Today (5/16)	Tomorrow (5/17)	Thu (5/18)
91° 63°	91° 66°	88° 66°

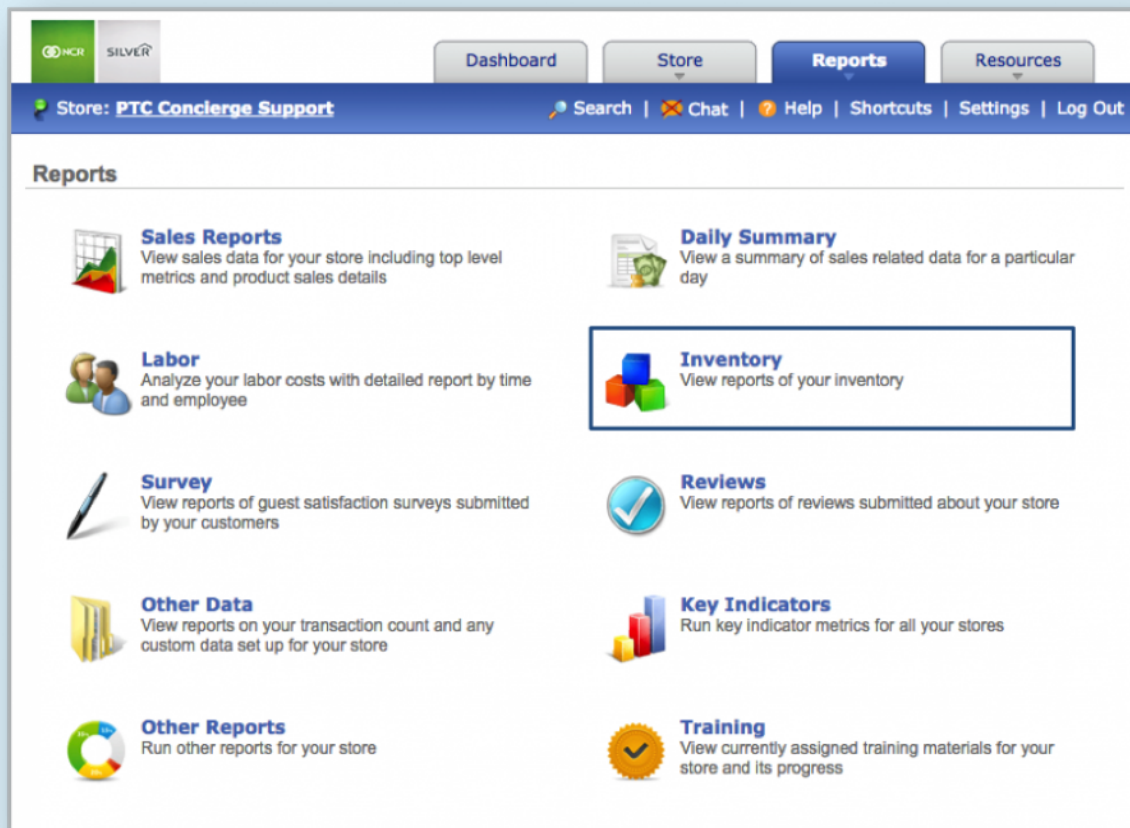
[View Full 5-Day Forecast](#)

Today's Schedule

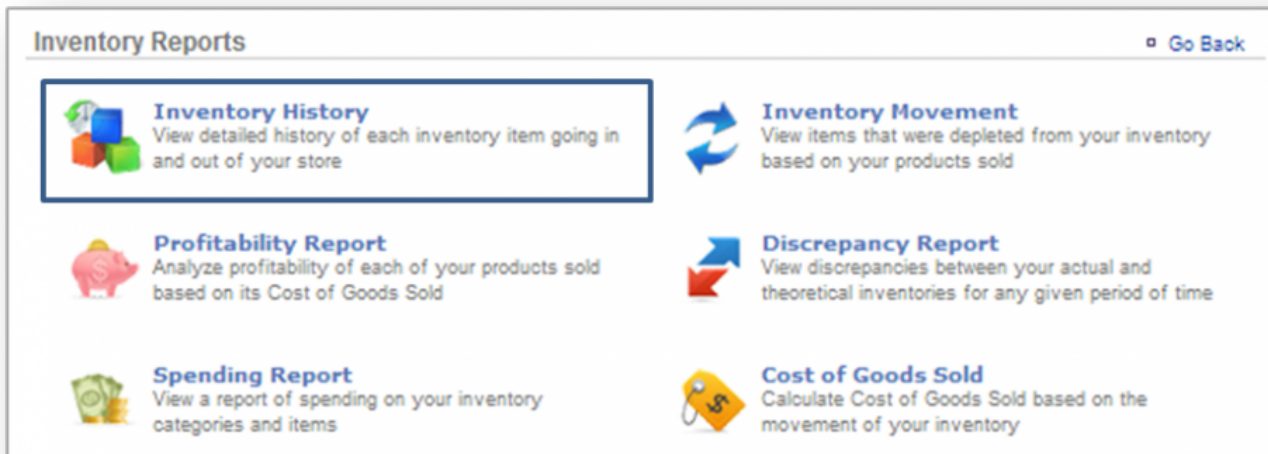
Sales Forecast

Basis	Year Sales	Week Sales
4 Weeks	\$160,562	\$3,088
8 Weeks	\$117,738	\$2,264
52 Weeks	\$365,650	\$7,032

✿ **Hint:** You can also access the Inventory by clicking on the **Reports** tab and then on **Inventory**.



STEP 2: From the *Inventory Reports* screen, click ***Inventory History***.



STEP 3: The *Inventory History Report* will provide you with inventory data for the date range you set. When viewing this report, you will have the option to:

- **Select a date range.** Enter your preferred date range at the top of the page and click ***Update***.
- **View all items or a single item.** Click the drop down arrow to the right of *Items* and select ***All Items***, or a single item from the inventory list that appears. You can also view information for a single item by

clicking on that item within the table.

The screenshot shows the 'Inventory History' interface. The main table lists various items with their dates, details, quantities, and theoretical on-hand amounts. An orange box highlights the 'White Shopping Bag' item, and an arrow points to a detailed view of this item's history.

Date	Item	Details	Quantity	Theoretical On Hand
9/4/2014 10:00 PM	Dark Chocolate Chunks	Reconciled Inventory (Not Provided)	-0.73 lb	0.00 lb
9/4/2014 10:00 PM	Chunky Chocolate Batter	Reconciled Inventory (Not Provided)	+0.04 lb	0.63 lb
9/4/2014 10:00 PM	2.5 Gal Icee Syrup	Reconciled Inventory (Not Provided)	-0.36 gal	2.50 gal
9/4/2014 10:00 PM	White Shopping Bag	Reconciled Inventory (Not Provided)	-7.50 Each	5.00 Each
9/4/2014 10:00 PM	2.5 Gal Cherry Coke Syrup	Reconciled Inventory (Not Provided)	-0.56 gal	5.35 gal
9/4/2014 10:00 PM	5 Gal Other Icee Syrup	Reconciled Inventory (Not Provided)	-0.38 gal	6.04 gal
9/4/2014 10:00 PM	Snickerdoodle	Reconciled Inventory (Not Provided)		
9/4/2014 10:00 PM	5 Gal Mr Pibb Syrup	Reconciled Inventory (Not Provided)		
9/4/2014 10:00 PM	5 Gal Sprite Syrup	Reconciled Inventory (Not Provided)		
9/4/2014 10:00 PM	5 Gal Diet Coke Syrup	Reconciled Inventory (Not Provided)		
9/4/2014 10:00 PM	Chevy Pecan Supreme	Reconciled Inventory (Not Provided)		
9/4/2014 10:00 PM	Pecan Pieces	Reconciled Inventory (Not Provided)		
9/4/2014 10:00 PM	Brilliant Orange Icing	Reconciled Inventory (Not Provided)		
9/4/2014 10:00 PM	Brilliant Green Icing	Reconciled Inventory (Not Provided)		
9/4/2014 10:00 PM	2.5 Gal Coke Syrup	Reconciled Inventory (Not Provided)		
9/4/2014 10:00 PM	Red Velvet Cheesecake	Reconciled Inventory (Not Provided)		
9/4/2014 10:00 PM	Double Fudge	Reconciled Inventory (Not Provided)	-9.30 lb	18.60 lb
9/4/2014 10:00 PM	Rainbow Sugar	Reconciled Inventory (Not Provided)	-3.81 lb	19.93 lb
9/4/2014 10:00 PM	Brilliant Pink Icing	Reconciled Inventory (Not Provided)	-2.10 lb	22.40 lb
9/4/2014 10:00 PM	Cheesecake	Reconciled Inventory (Not Provided)	-3.22 lb	23.24 lb
9/4/2014 10:00 PM	Red Icing	Reconciled Inventory (Not Provided)	-3.50 lb	24.50 lb
9/4/2014 10:00 PM	Brilliant Blue Icing	Reconciled Inventory (Not Provided)	-3.50 lb	25.20 lb

Date	Details	Quantity	Theoretical On Hand
9/4/2014 10:00 PM	Reconciled Inventory (Not Provided)	-7.50 Each	5.00 Each
8/28/2014 10:00 PM	Reconciled Inventory (Not Provided)	-37.50 Each	12.50 Each
8/21/2014 10:30 PM	Reconciled Inventory (Not Provided)	-25.00 Each	50.00 Each
8/14/2014 10:15 PM	Reconciled Inventory (Not Provided)	-25.00 Each	75.00 Each
8/7/2014 10:55 PM	Reconciled Inventory (Not Provided)	0.00 Each	100.00 Each



Hint: Quantity shown reflects adjustments made to specific inventory items for the date reflected to the left of the inventory item name. The **Details** column will show the reason for the adjustment (if one is provided) and the **Theoretical on Hand** column shows what you should have on hand based on the adjustments made.

Related Topics

[Profitability Report](#)

[Spending Report](#)

[Inventory Movement](#)

[Discrepancy Report](#)

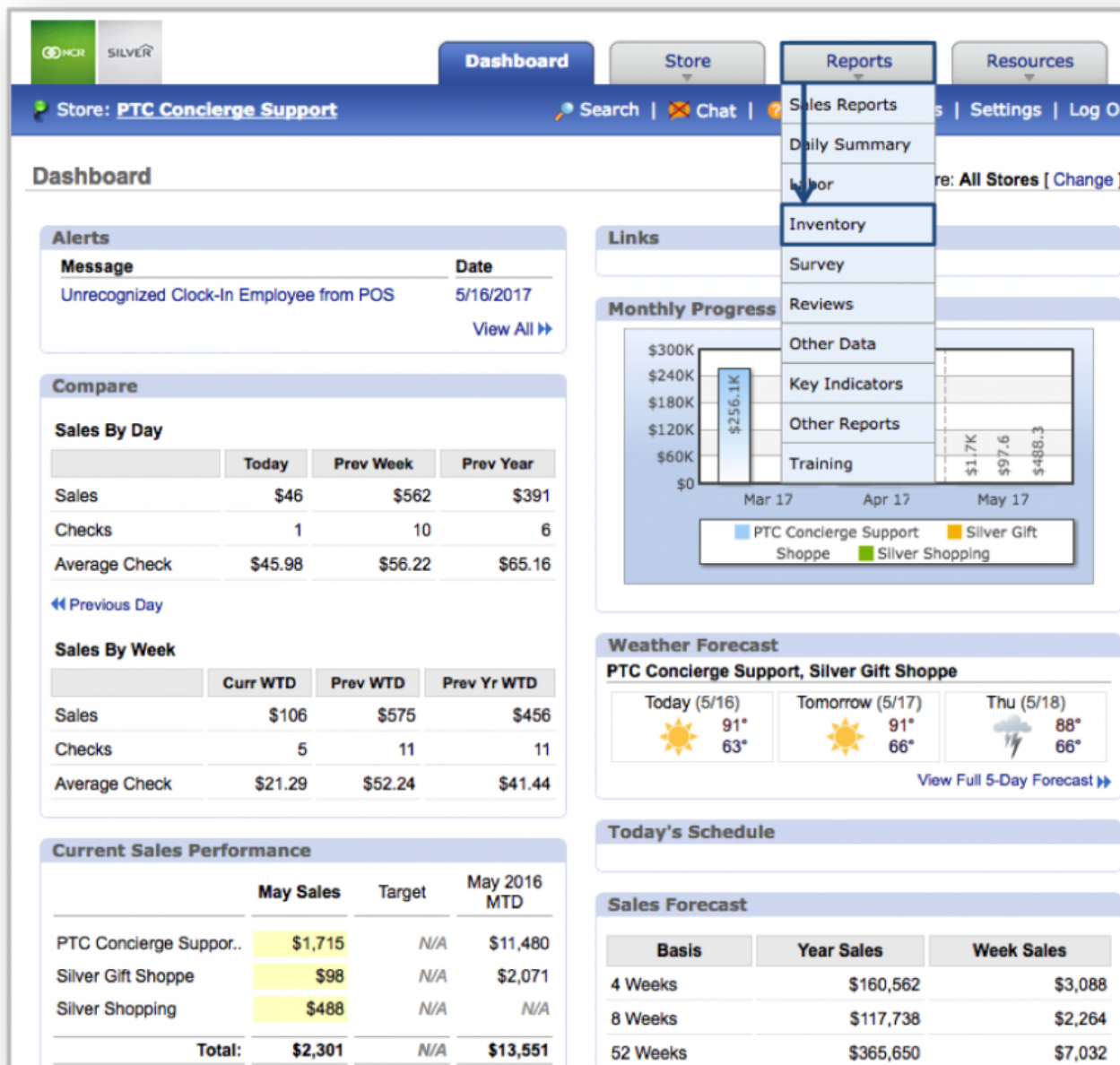
[Cost of Goods Sold](#)

Spending Report

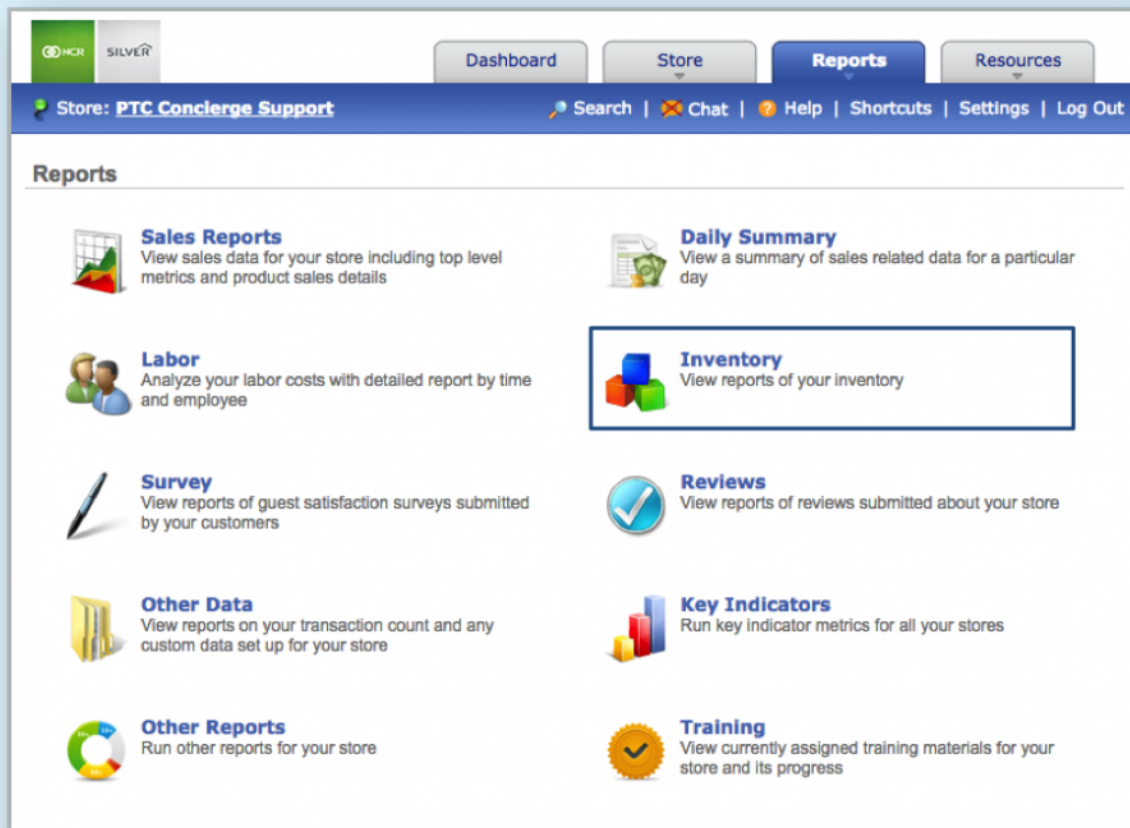
The purpose of this section is to showcase the *Spending Report* category.

Spending Report

STEP 1: From your Dashboard view, mouse over the **Reports** tab and click **Inventory**.




✿ **Hint:** You can also access the Inventory by clicking on the **Reports** tab and then on **Inventory**.




STEP 2: From the *Inventory Reports* screen, click **Spending Report**.


Inventory Reports Go Back




Inventory History
View detailed history of each inventory item going in and out of your store




Profitability Report
Analyze profitability of each of your products sold based on its Cost of Goods Sold




Spending Report
View a report of spending on your inventory categories and items



Inventory Movement
View items that were depleted from your inventory based on your products sold

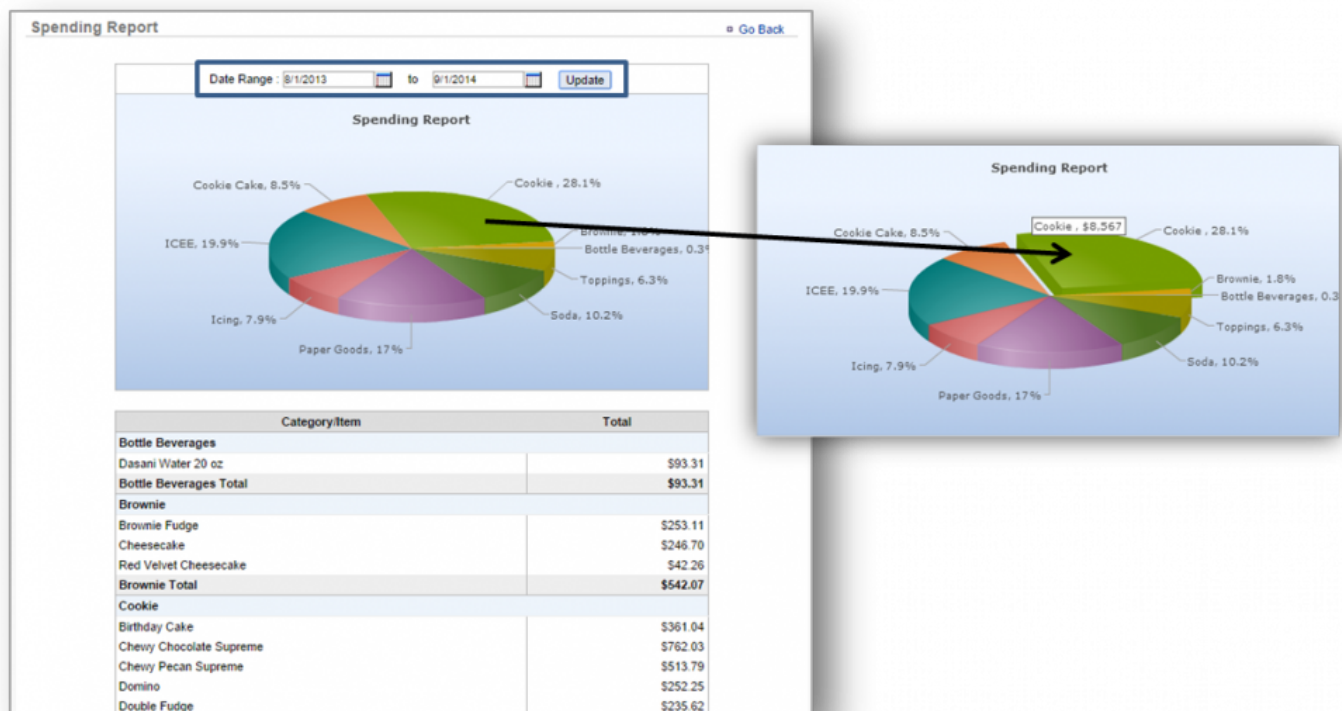


Discrepancy Report
View discrepancies between your actual and theoretical inventories for any given period of time



Cost of Goods Sold
Calculate Cost of Goods Sold based on the movement of your inventory

STEP 3: The *Spending Report* will provide you with the total spent on inventory items for the date range you set. To select a date range, enter your preferred date range at the top of the page and click **Update**. Keep in mind that totals shown do *not* include the taking or depletion of inventory. This report only reflects the total amount of money spent on inventory, within a specified date range.





Hint: Click on any area of the pie chart to see a category total.

Related Topics

[Inventory History](#)

[Profitability Report](#)

[Inventory Movement](#)

[Discrepancy Report](#)

[Cost of Goods Sold](#)

Discrepancy Report

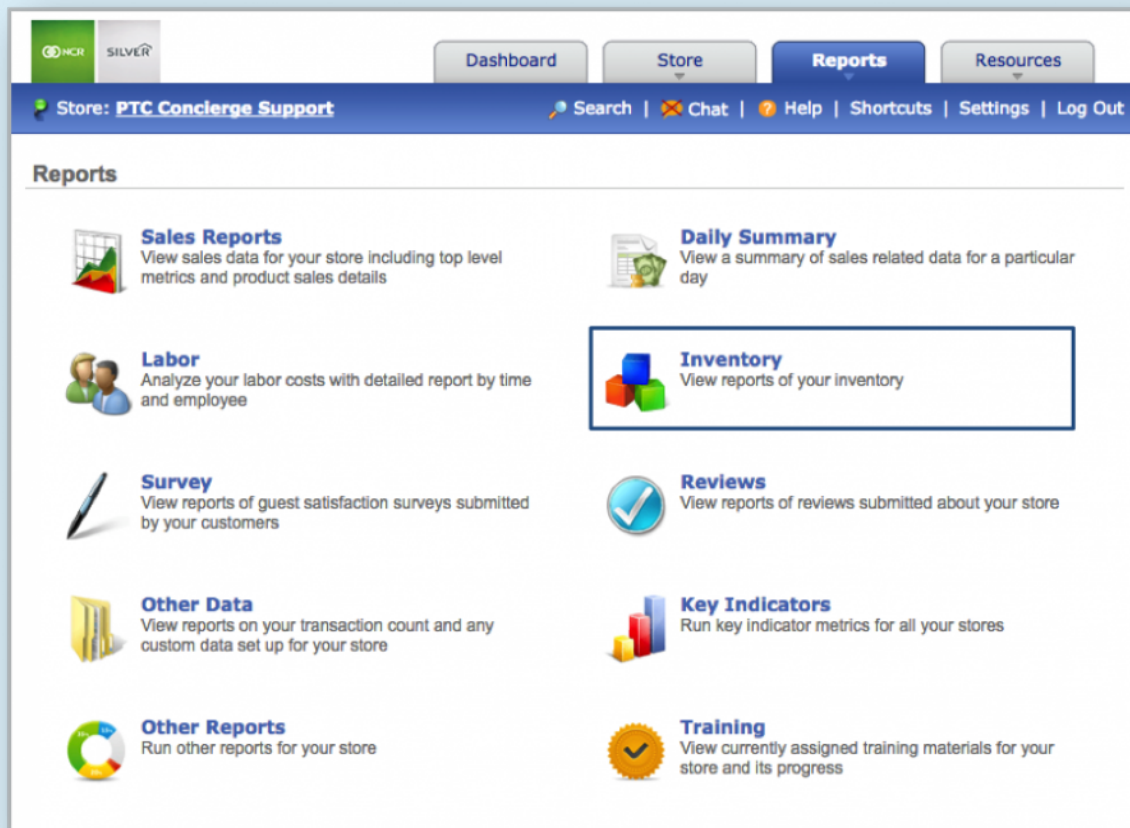
The purpose of this section is to showcase the *Discrepancy Report* category.

Discrepancy Report

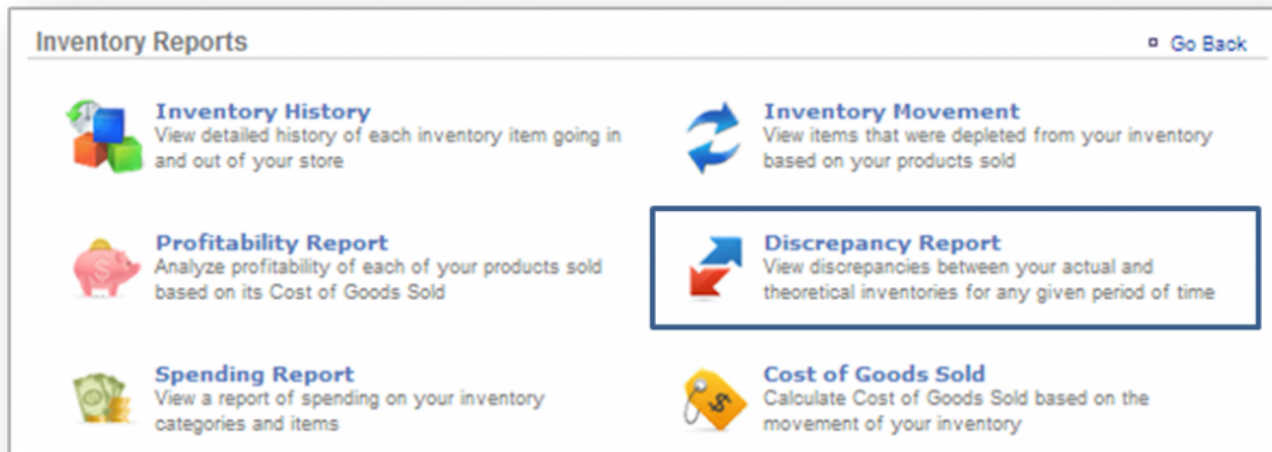
STEP 1: From your Dashboard view, mouse over the **Reports** tab and click **Inventory**.



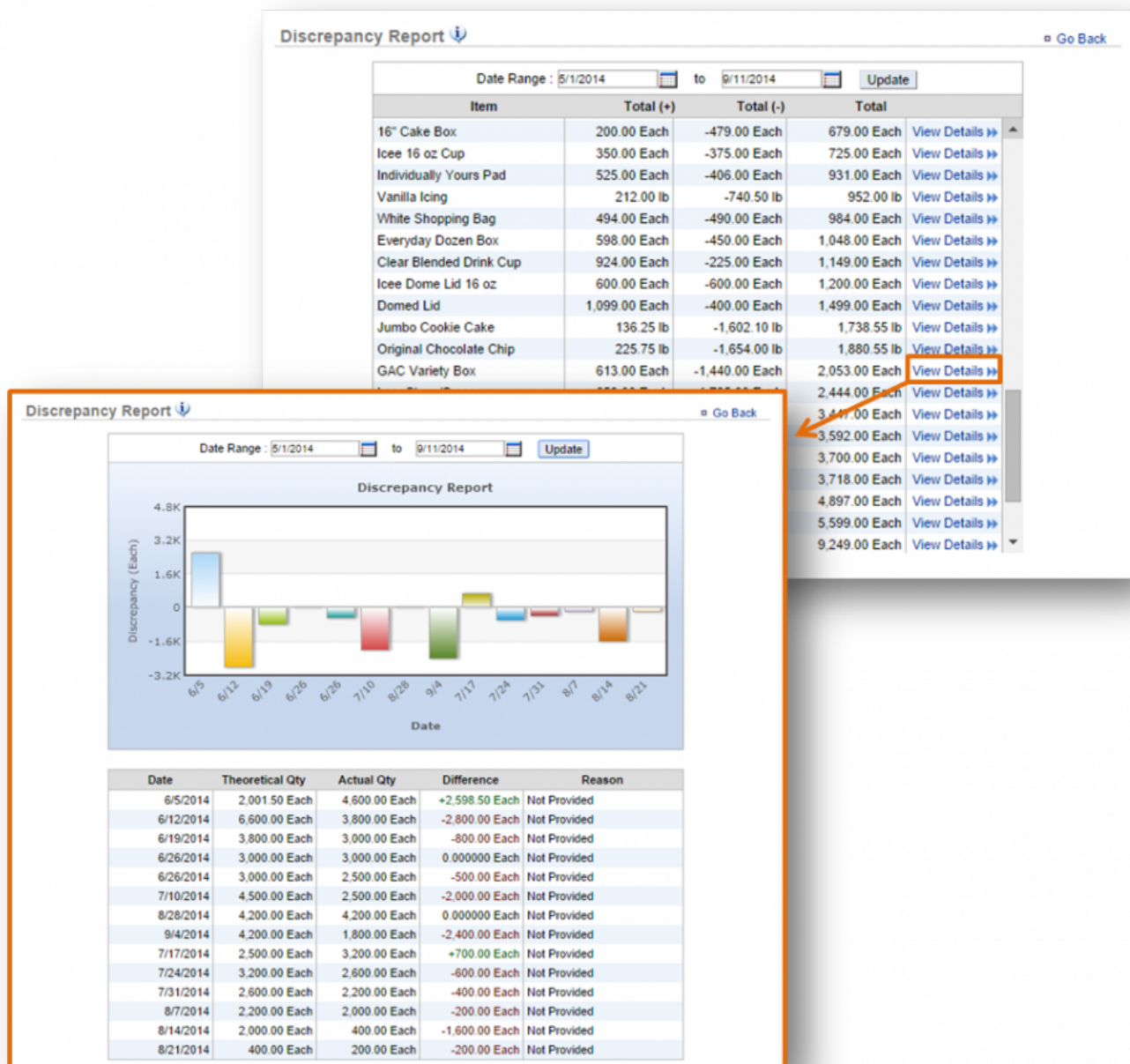
✿ **Hint:** You can also access the Inventory by clicking on the **Reports** tab and then on **Inventory**.



STEP 2: From the *Inventory Reports* screen, click **Discrepancy Report**.



STEP 3: The *Discrepancy Report* will highlight inventory discrepancies for the date range you set. To select a date range, enter your preferred date range at the top of the page and click **Update**. Your inventory and any noted discrepancies will appear on screen. To view details for an item, click **View Details** to the right of the inventory total in the chart detail.



Details will reflect:

- The date an adjustment was made.
- Theoretical quantity (what you should have on hand based on POS rings and actual inventory).
- Actual quantity (what you have on hand based on the taking of inventory).
- Difference (the adjustment that was made; whether it was an addition or subtraction).
- Reason (the reason for the adjustment; you can elect not to include one).

Related Topics[Inventory History](#)[Profitability Report](#)[Spending Report](#)[Inventory Movement](#)[Cost of Goods Sold](#)

Cost of Goods Sold

The purpose of this section is to showcase the *Cost of Goods Sold Report* category.

Cost of Goods Sold Report

STEP 1: From your Dashboard view, mouse over the **Reports** tab and click **Inventory**.

The screenshot shows the NCR Silver POS system dashboard for the store 'PTC Concierge Support'. The 'Reports' tab is selected, and the 'Inventory' option is highlighted in the dropdown menu. The dashboard includes sections for Alerts, Compare (Sales By Day and Sales By Week), Current Sales Performance, Monthly Progress (bar chart), Weather Forecast, Today's Schedule, and Sales Forecast.

Alerts

Message	Date
Unrecognized Clock-In Employee from POS	5/16/2017

[View All](#)

Compare

Sales By Day

	Today	Prev Week	Prev Year
Sales	\$46	\$562	\$391
Checks	1	10	6
Average Check	\$45.98	\$56.22	\$65.16

[Previous Day](#)

Sales By Week

	Curr WTD	Prev WTD	Prev Yr WTD
Sales	\$106	\$575	\$456
Checks	5	11	11
Average Check	\$21.29	\$52.24	\$41.44

Current Sales Performance

	May Sales	Target	May 2016 MTD
PTC Concierge Support..	\$1,715	N/A	\$11,480
Silver Gift Shoppe	\$98	N/A	\$2,071
Silver Shopping	\$488	N/A	N/A
Total:	\$2,301	N/A	\$13,551

Monthly Progress

Bar chart showing sales for PTC Concierge Support, Silver Gift Shoppe, and Silver Shopping from Mar 17 to May 17. PTC Concierge Support sales are \$256.1K.

Weather Forecast

PTC Concierge Support, Silver Gift Shoppe

Today (5/16)	Tomorrow (5/17)	Thu (5/18)
91° 63°	91° 66°	88° 66°

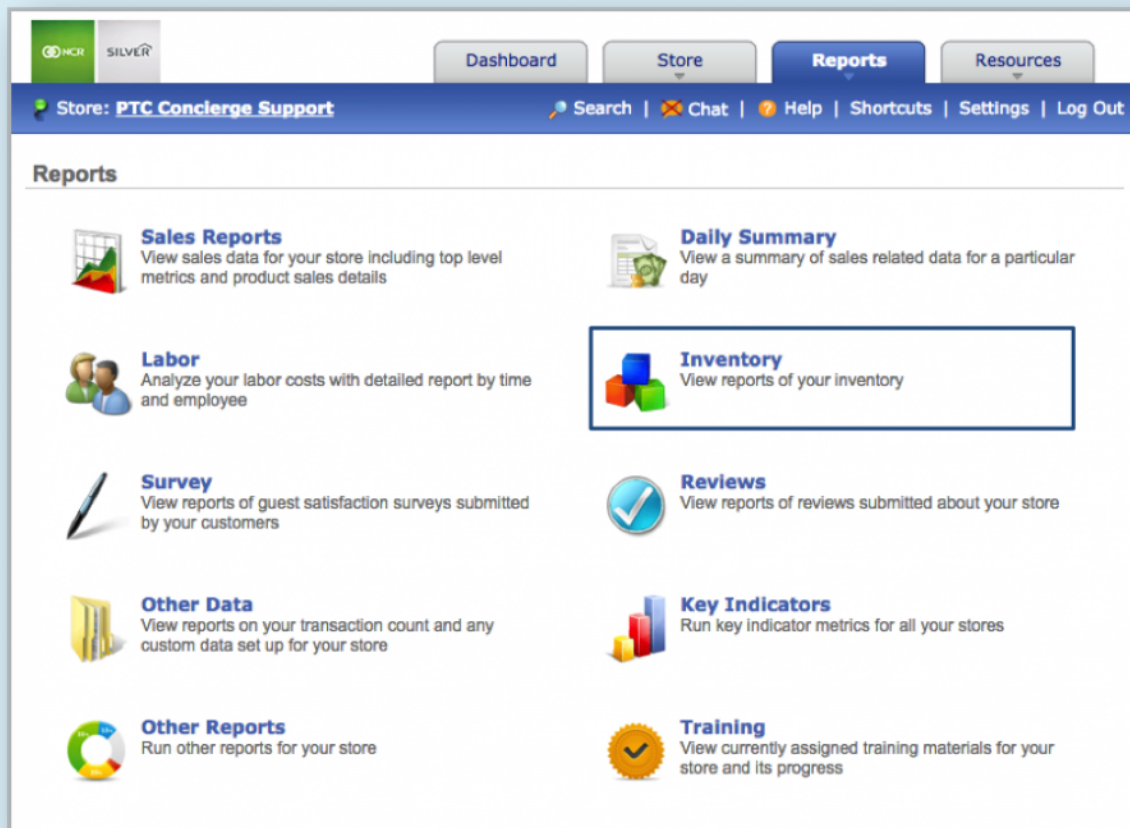
[View Full 5-Day Forecast](#)

Today's Schedule

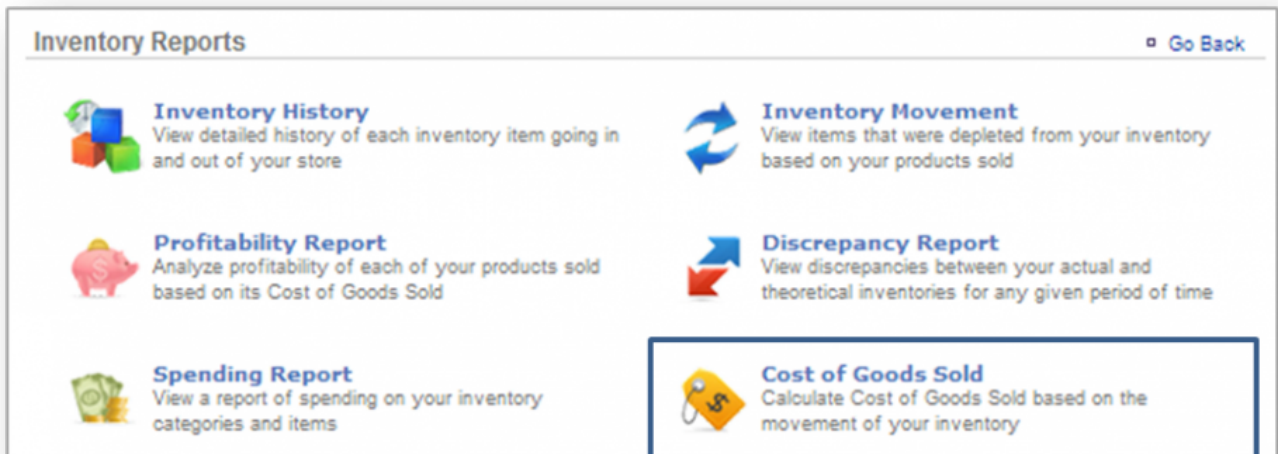
Sales Forecast

Basis	Year Sales	Week Sales
4 Weeks	\$160,562	\$3,088
8 Weeks	\$117,738	\$2,264
52 Weeks	\$365,650	\$7,032

✿ **Hint:** You can also access the Inventory by clicking on the **Reports** tab and then on **Inventory**.



STEP 2: From the *Inventory Reports* screen, click **Cost of Goods Sold**.



STEP 3: The *Cost of Goods Sold Report* will provide you with your total cost of goods sold for the date range you set. To select a date range, enter your preferred date range at the top of the page and click **Update**.

Cost of Good Sold
[Go Back](#)
[More Options](#)

Date Range : 8/1/2014 to 9/1/2014
[Update](#)

Cookie

Inventory Item	Unit	Beginning	Received	Ending	Used	Used Cost	Cost to Sales	Cost to Cat Sales
Original Chocolate Chip	lb	314.10	576.00	367.20	522.90	\$941.22	5.24%	9.31%
Oatmeal Walnut Raisin	lb	54.00	30.90	45.60	39.30	\$65.95	0.37%	0.65%
Pecan	lb	64.80	30.90	56.40	39.30	\$86.71	0.48%	0.86%
Double Fudge	lb	72.30	0.30	29.70	42.90	\$68.07	0.38%	0.67%
White Chunk Macadamia	lb	69.00	210.60	196.80	82.80	\$198.20	1.10%	1.96%
Peanut Butter Supreme	lb	132.60	120.30	143.40	124.20	\$233.25	1.30%	2.31%
Sugar	lb	90.60	300.00	219.00	171.60	\$243.16	1.35%	2.41%
Chewy Chocolate Supreme	lb	40.80	90.00	58.20	72.60	\$210.27	1.17%	2.08%
Chewy Pecan Supreme	lb	30.60	60.00	30.00	60.60	\$153.98	0.86%	1.52%
Snickerdoodle	lb	42.90	30.00	16.80	56.10	\$97.18	0.54%	0.96%
Domino	lb	41.40	30.00	54.30	17.10	\$29.22	0.16%	0.29%
Birthday Cake	lb	40.80	60.60	60.00	41.40	\$80.88	0.45%	0.80%
Chunky Chocolate Batter	lb	0.00	0	0.59	0.10	\$0.20	0.00%	0.00%
Total						\$2,408.29	13.42%	23.82%

Cookie Cake

Inventory Item	Unit	Beginning	Received	Ending	Used	Used Cost	Cost to Sales	Cost to Cat Sales
Jumbo Cookie Cake	lb	305.40	450.00	229.50	525.90	\$905.76	5.05%	15.87%
Total						\$905.76	5.05%	15.87%

Cost %: **35.14%**

Total Cost: **\$6,307.06**

Net Sales: **\$17,946.37**

Your report will be grouped by category and will reflect:

- Each inventory item name.
- The unit of measurement for each item.
- Beginning Inventory (your beginning inventory for the date range you set).
- Received Inventory (inventory received for the date range you set).
- Ending Inventory (your ending inventory as of the date range you set).
- Used Inventory (the amount of inventory used over the course of the date range you set).
- Used Cost (the cost of each inventory item multiplied by the amount that was used).
- Cost to Sales (the percentage of inventory items against total sales for the date range you set).

- Cost to Category Sales (the percentage of inventory items against total *category* sales for the date range you set).

✿ **Note:** Total cost of goods percentage (against total sales) for the date range you set will appear at the bottom right corner of this report, along with total cost of goods and total net sales. You can export this report by clicking **More Options** at the right top corner of the page and then **Export Report**.

Related Topics

[Inventory History](#)

[Profitability Report](#)

[Spending Report](#)

[Inventory Movement](#)

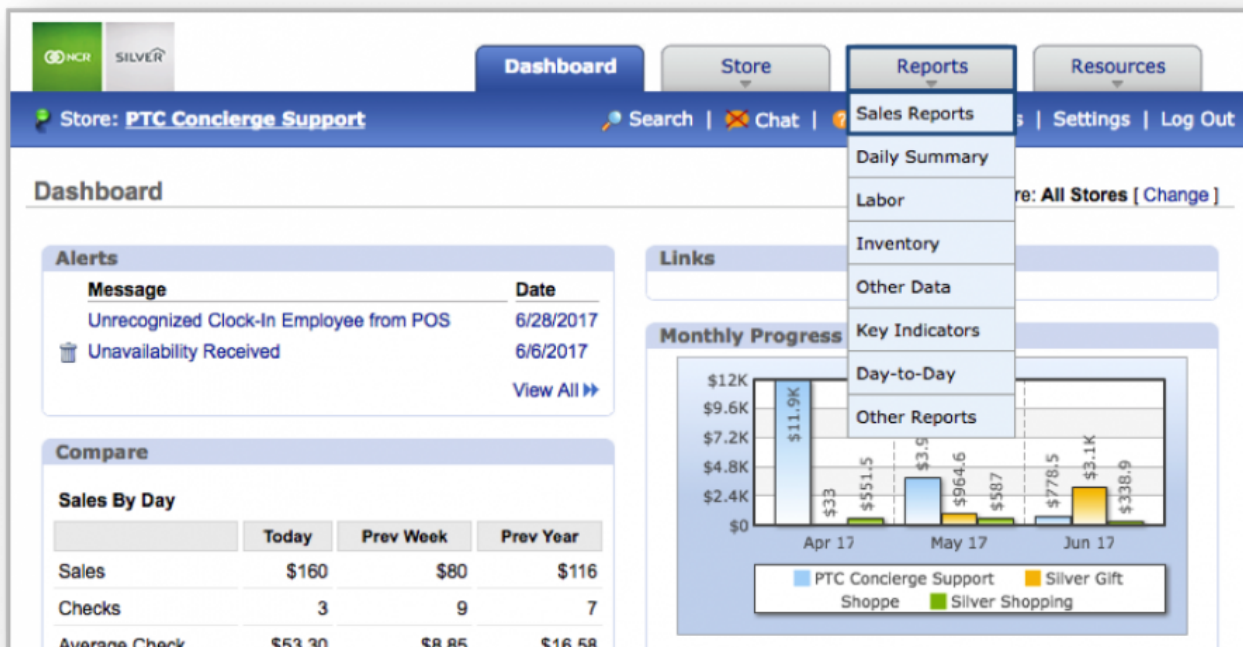
[Discrepancy Report](#)

Product Mix Reports

The purpose of this section is to illustrate how to generate, and view a *Product Mix Report*.

Product Mix Report

STEP 1: From your Dashboard view, mouse over the **Reports** tab and click **Sales Reports**.

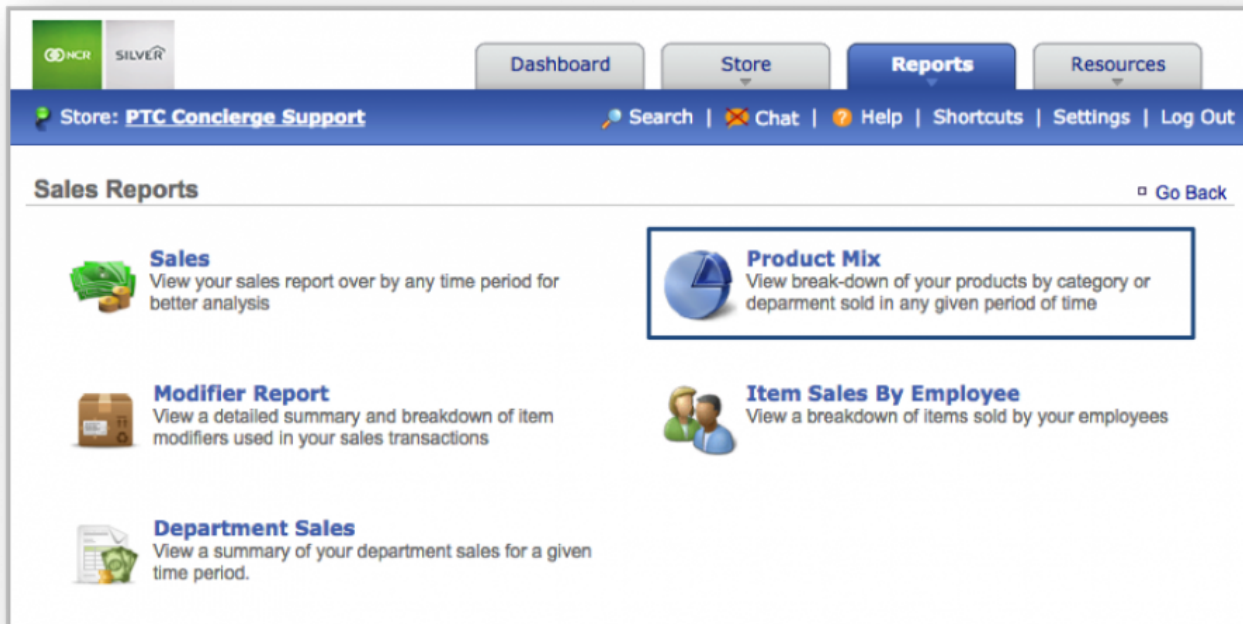


✿ **Hint:** You can also access Sales Reports by clicking on the **Reports** tab and then on **Sales Reports**.

The screenshot shows the NCR Silver interface. At the top, there's a navigation bar with tabs for Dashboard, Store, Reports (highlighted), and Resources. Below this is a blue header bar with the store name 'Store: PTC Conclerge Support' and links for Search, Chat, Help, Shortcuts, Settings, and Log Out. The main section is titled 'Reports' and contains ten report categories, each with an icon and a brief description:

- Sales Reports**: View sales data for your store including top level metrics and product sales details. (Icon: Bar chart with green and red bars)
- Daily Summary**: View a summary of sales related data for a particular day. (Icon: Document with a green checkmark)
- Labor**: Analyze your labor costs with detailed report by time and employee. (Icon: Two people silhouettes)
- Inventory**: View reports of your inventory. (Icon: Three colored cubes)
- Survey**: View reports of guest satisfaction surveys submitted by your customers. (Icon: A pen writing on a document)
- Reviews**: View reports of reviews submitted about your store. (Icon: A blue circle with a white checkmark)
- Other Data**: View reports on your transaction count and any custom data set up for your store. (Icon: A stack of yellow folders)
- Key Indicators**: Run key indicator metrics for all your stores. (Icon: A bar chart with red and blue bars)
- Other Reports**: Run other reports for your store. (Icon: A circular progress chart)
- Training**: View currently assigned training materials for your store and its progress. (Icon: A yellow star with a checkmark)

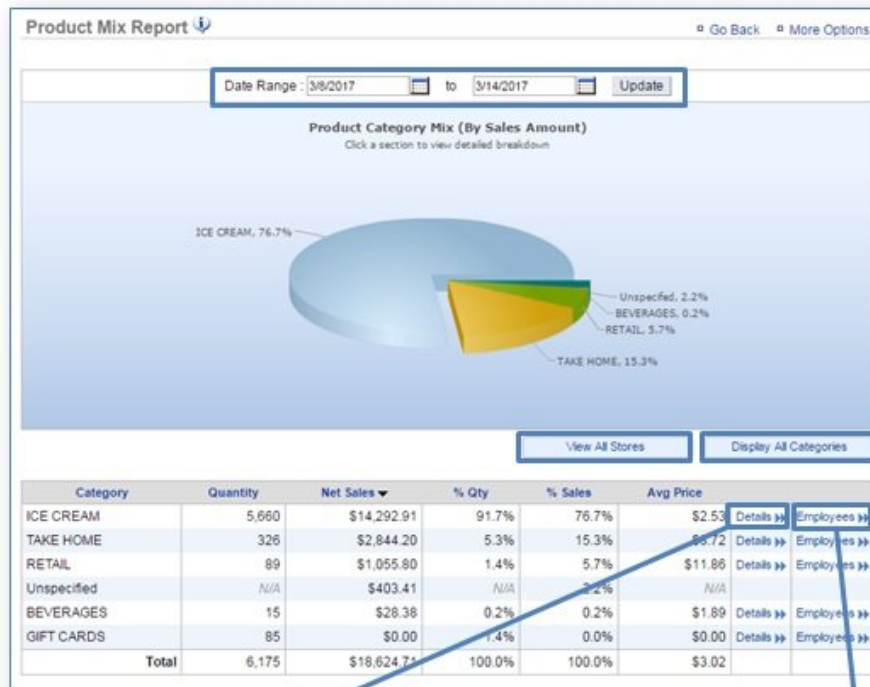
STEP 2: From the Sales Reports screen, click **Product Mix**.



STEP 3: The *Product Mix Report* will provide you with sales information related to product for the date range you set. To select a date range, enter your preferred date range at the top of the page and click **Update**.

- Click **Details** at the bottom right of the chart details section to view sales information for items within a specified category. Within this view, click **Trend** to the right of any category item to see the purchasing trend for the date range you set. See **STEP 3** for more detailed information.

- Click **Employees**, to view your item sales for that category by your employees.



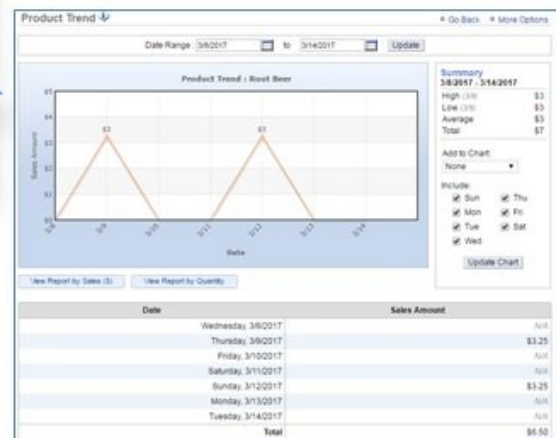
Item Sales By Employee Go Back More Options

Date Range: 3/8/2017 to 3/14/2017 Update

Filter By: All Employees | BEVERAGES

Employee	Category	Item	Quantity	Sales	Discounts
Cashier 101	BEVERAGES	Boyl's	3	\$5.25	\$0.00
Cashier 101	BEVERAGES	Root Beer	2	\$6.50	\$0.00
Cashier 101	BEVERAGES	Water	1	\$1.45	\$0.00
Cashier 201	BEVERAGES	Truck Boyl's	6	\$11.04	\$0.00
Cashier 201	BEVERAGES	Truck Water	3	\$4.14	\$0.00
Total			15	\$28.38	\$0.00

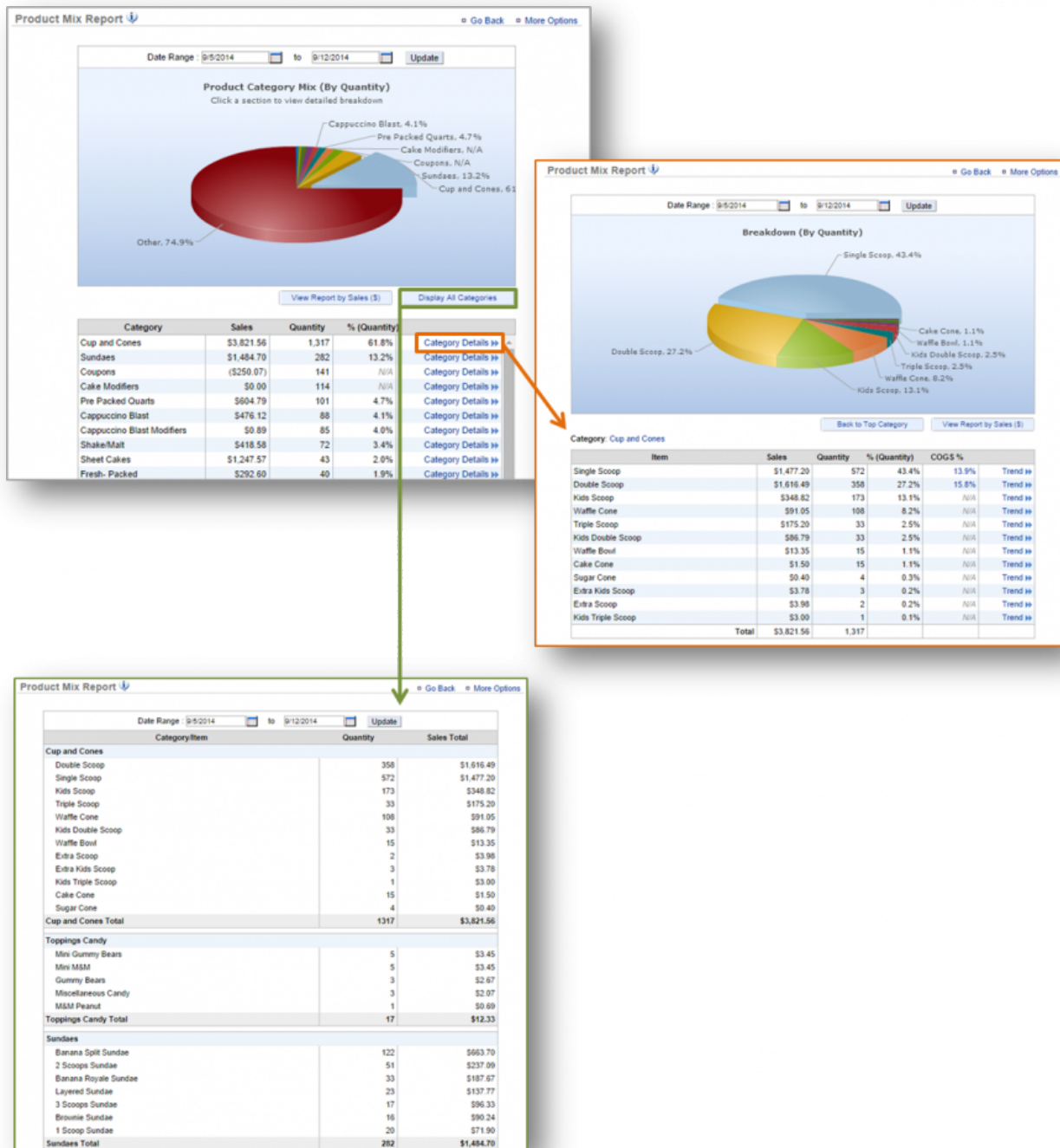
Copyright © 2017 NCR Corporation
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STEP 4: To view your product mix report by quantity of items sold, click ***View Report by Quantity***.

- Click ***Category Details*** at the bottom right of the chart details section to view sales information by quantity for items within a specified category.
- Click ***Display All Categories*** at the bottom right of your chart to view product mix detail as a list. This report will show quantity and sales for all categories and items pertaining to each category within the

date range you set.



* **Note:** If you are looking at product mix by *category*, the quantity shown will be for the entire category. If you are looking at a product mix report for individual items, the quantity shown will be for the specified item only.



Did you know? You can export any *Product Mix* report by clicking ***More Options*** at the top right corner of the page and then, ***Export Report***.

Related Topics

[Sales Reports](#)

[Inventory Reports](#)

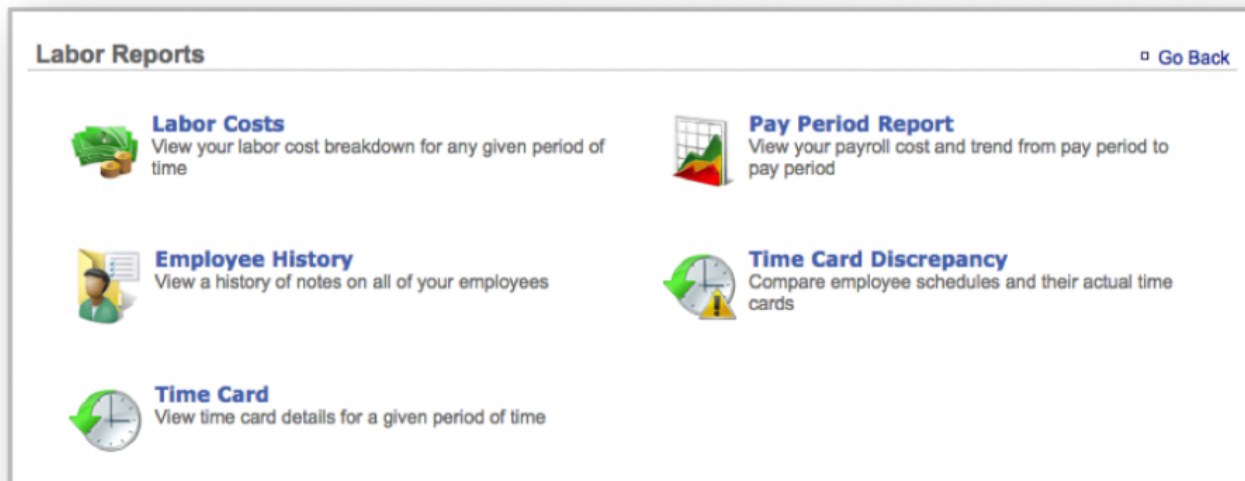
[Labor Reports](#)

[Training Reports](#)

[Survey Reports](#)

Labor Reports

The purpose of this section is to illustrate how to generate, and view, various *Labor Reports*.



For more detailed information, click on a topic below.

[Labor Costs Report](#)

[Pay Period Report](#)

[Employee History Report](#)

[Time Card Discrepancy Report](#)

[Additional Related Topics](#)

[Sales Reports](#)

[Inventory Reports](#)

[Product Mix Reports](#)

[Training Reports](#)

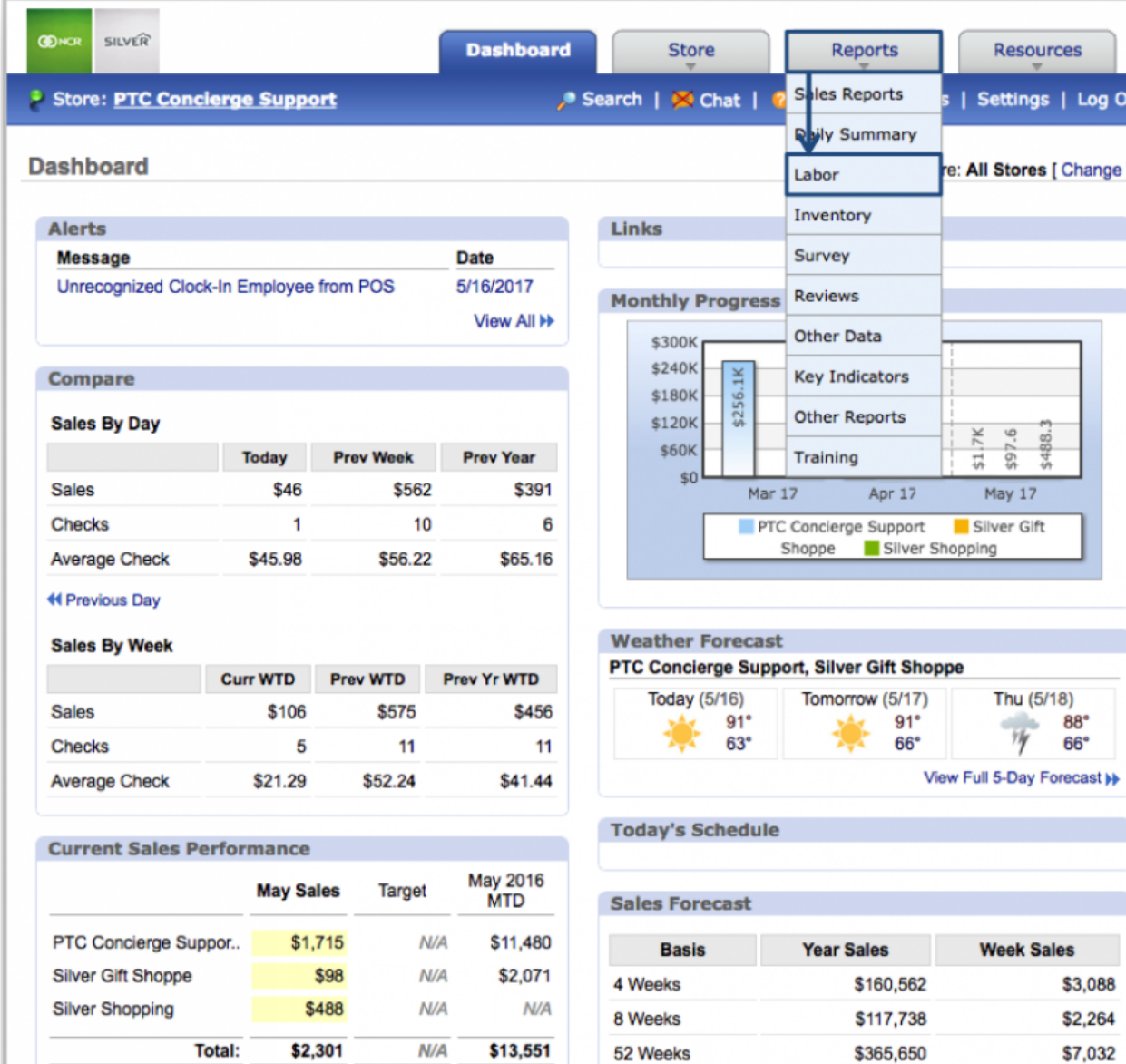
[Survey Reports](#)

Labor Costs Report

The purpose of this section is to illustrate how to generate a *Labor Costs Report*.

Generate a Labor Costs Report

STEP 1: From your Dashboard view, mouse over the **Reports** tab and click **Labor**.



The screenshot shows the NCR Silver dashboard for the store "PTC Concierge Support". The "Reports" tab is selected, and the "Labor" option is highlighted in the dropdown menu. The dashboard includes sections for Alerts, Compare (Sales By Day and Sales By Week), Current Sales Performance, Links, Monthly Progress (a bar chart showing sales for Mar 17, Apr 17, and May 17), Weather Forecast, Today's Schedule, and Sales Forecast.

Alerts

Message	Date
Unrecognized Clock-In Employee from POS	5/16/2017

[View All](#)

Compare

Sales By Day

	Today	Prev Week	Prev Year
Sales	\$46	\$562	\$391
Checks	1	10	6
Average Check	\$45.98	\$56.22	\$65.16

[Previous Day](#)

Sales By Week

	Curr WTD	Prev WTD	Prev Yr WTD
Sales	\$106	\$575	\$456
Checks	5	11	11
Average Check	\$21.29	\$52.24	\$41.44

Current Sales Performance

	May Sales	Target	May 2016 MTD
PTC Concierge Support..	\$1,715	N/A	\$11,480
Silver Gift Shoppe	\$98	N/A	\$2,071
Silver Shopping	\$488	N/A	N/A
Total:	\$2,301	N/A	\$13,551

Monthly Progress

Bar chart showing sales for Mar 17, Apr 17, and May 17. Legend: PTC Concierge Support (blue), Silver Gift Shoppe (yellow), Silver Shopping (green).

Weather Forecast

PTC Concierge Support, Silver Gift Shoppe

Today (5/16)	Tomorrow (5/17)	Thu (5/18)
91° 63°	91° 66°	88° 66°

[View Full 5-Day Forecast](#)

Today's Schedule

Sales Forecast

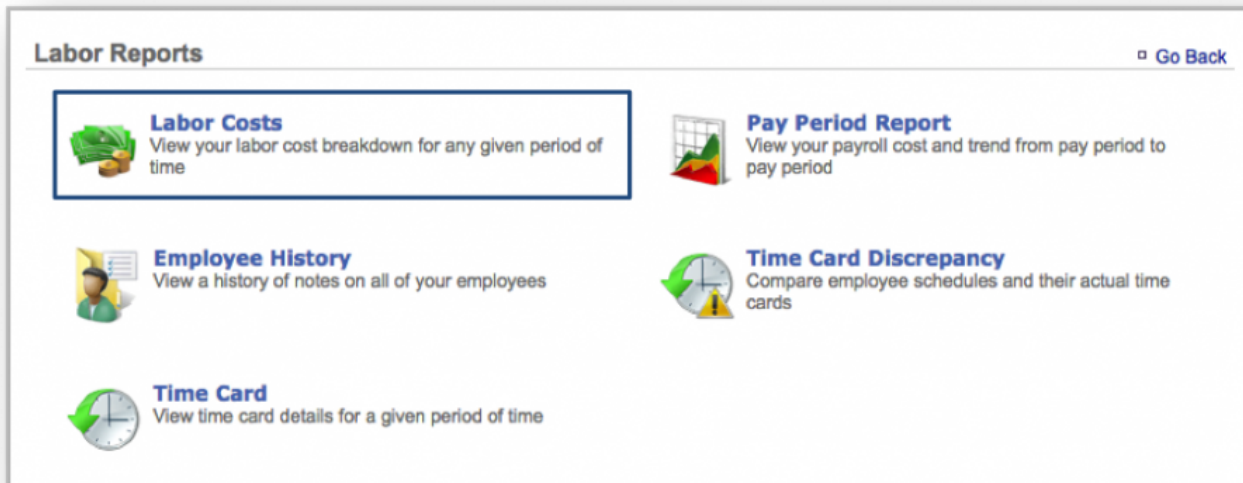
Basis	Year Sales	Week Sales
4 Weeks	\$160,562	\$3,088
8 Weeks	\$117,738	\$2,264
52 Weeks	\$365,650	\$7,032

✿ **Hint:** You can also access the *Labor* reports by clicking on the **Reports** tab and then on **Labor**.

The screenshot shows the NCR Silver interface for a store named "PTC Conclerge Support". The top navigation bar includes "Dashboard", "Store", "Reports" (highlighted), and "Resources". Below the navigation bar is a search bar and links for "Search", "Chat", "Help", "Shortcuts", "Settings", and "Log Out". The main section is titled "Reports" and contains ten report categories, each with an icon and a brief description:

- Sales Reports**: View sales data for your store including top level metrics and product sales details.
- Daily Summary**: View a summary of sales related data for a particular day.
- Labor**: Analyze your labor costs with detailed report by time and employee. (This category is highlighted with a blue border in the original image.)
- Inventory**: View reports of your inventory.
- Survey**: View reports of guest satisfaction surveys submitted by your customers.
- Reviews**: View reports of reviews submitted about your store.
- Other Data**: View reports on your transaction count and any custom data set up for your store.
- Key Indicators**: Run key indicator metrics for all your stores.
- Other Reports**: Run other reports for your store.
- Training**: View currently assigned training materials for your store and its progress.

STEP 2: From the *Labor Reports* screen, click **Labor Costs**.



STEP 3: This report will show the hours and corresponding pay for each of your employees within the date range you set. To select a date range, enter your preferred date range at the top of the page and click **Update**.

- Keep in mind that you must have already entered a pay rate for each of your employees to generate pay totals. Your total labor costs (for the selected date range) along with net sales will generate your labor percentage, which will be shown at the bottom right corner of the screen.

Labor Costs [Go Back](#) [More Options](#) [Export Report](#)

Date Range : 2/14/2011 to 2/27/2011 [Update](#)

Name	Pay Rate	Hours	Amount (\$)
Christina Hernandez	\$8.00	36.87	\$294.96
Bernadette Gregory	\$8.00	26.81	\$214.48
Brenda Hernandez	\$8.30	52.43	\$435.17
Michael Aguirre	\$8.00	37.90	\$303.20
Total Labor Costs		154.01	\$1,247.81
		Total Sales	\$10,120.76
		Labor %	12.3%



Did you know? You can export this report by clicking ***More Options*** at the top right corner of the page and then, ***Export Report***.

Related Topics

[Pay Period Report](#)

[Employee History Report](#)

[Time Card Discrepancy Report](#)

Pay Period Report

The purpose of this section is to illustrate how to generate a *Pay Period Report*.

Generate a Pay Period Report

STEP 1: From your Dashboard view, mouse over the **Reports** tab and click **Labor**.

The screenshot shows the NCR Silver dashboard for the store "PTC Concierge Support". The "Reports" tab is selected, and the "Labor" option is highlighted in the dropdown menu. The dashboard includes sections for Alerts, Compare (Sales By Day and Sales By Week), Current Sales Performance, Links, Monthly Progress (a bar chart showing sales for Mar 17, Apr 17, and May 17), Weather Forecast, Today's Schedule, and Sales Forecast.

Alerts

Message	Date
Unrecognized Clock-In Employee from POS	5/16/2017

[View All](#)

Compare

Sales By Day

	Today	Prev Week	Prev Year
Sales	\$46	\$562	\$391
Checks	1	10	6
Average Check	\$45.98	\$56.22	\$65.16

[Previous Day](#)

Sales By Week

	Curr WTD	Prev WTD	Prev Yr WTD
Sales	\$106	\$575	\$456
Checks	5	11	11
Average Check	\$21.29	\$52.24	\$41.44

Current Sales Performance

	May Sales	Target	May 2016 MTD
PTC Concierge Support..	\$1,715	N/A	\$11,480
Silver Gift Shoppe	\$98	N/A	\$2,071
Silver Shopping	\$488	N/A	N/A
Total:	\$2,301	N/A	\$13,551

Monthly Progress

Bar chart showing sales for Mar 17, Apr 17, and May 17. Legend: PTC Concierge Support (blue), Silver Gift Shoppe (yellow), Silver Shopping (green).

Weather Forecast

PTC Concierge Support, Silver Gift Shoppe

Today (5/16)	Tomorrow (5/17)	Thu (5/18)
91° 63°	91° 66°	88° 66°

[View Full 5-Day Forecast](#)

Today's Schedule

Sales Forecast

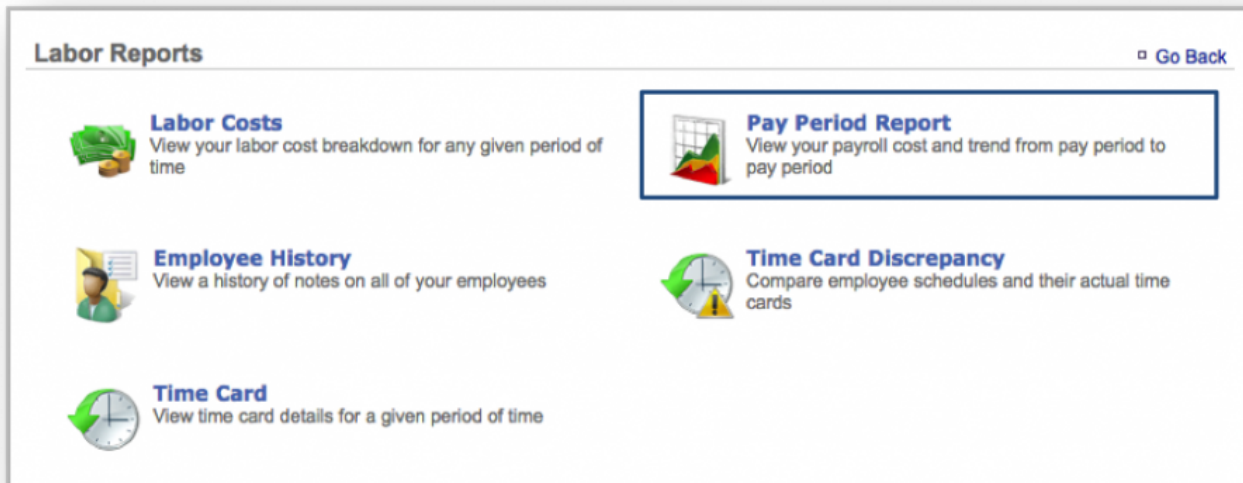
Basis	Year Sales	Week Sales
4 Weeks	\$160,562	\$3,088
8 Weeks	\$117,738	\$2,264
52 Weeks	\$365,650	\$7,032

✿ **Hint:** You can also access the *Labor* reports by clicking on the **Reports** tab and then on **Labor**.

The screenshot shows the NCR Silver interface for a store named "PTC Concierge Support". The top navigation bar includes tabs for "Dashboard", "Store", "Reports" (which is highlighted), and "Resources". Below the navigation bar, there is a search bar and links for "Search", "Chat", "Help", "Shortcuts", "Settings", and "Log Out". The main content area is titled "Reports" and displays a grid of report categories, each with an icon and a brief description. The "Labor" report category is highlighted with a blue border. The categories are:

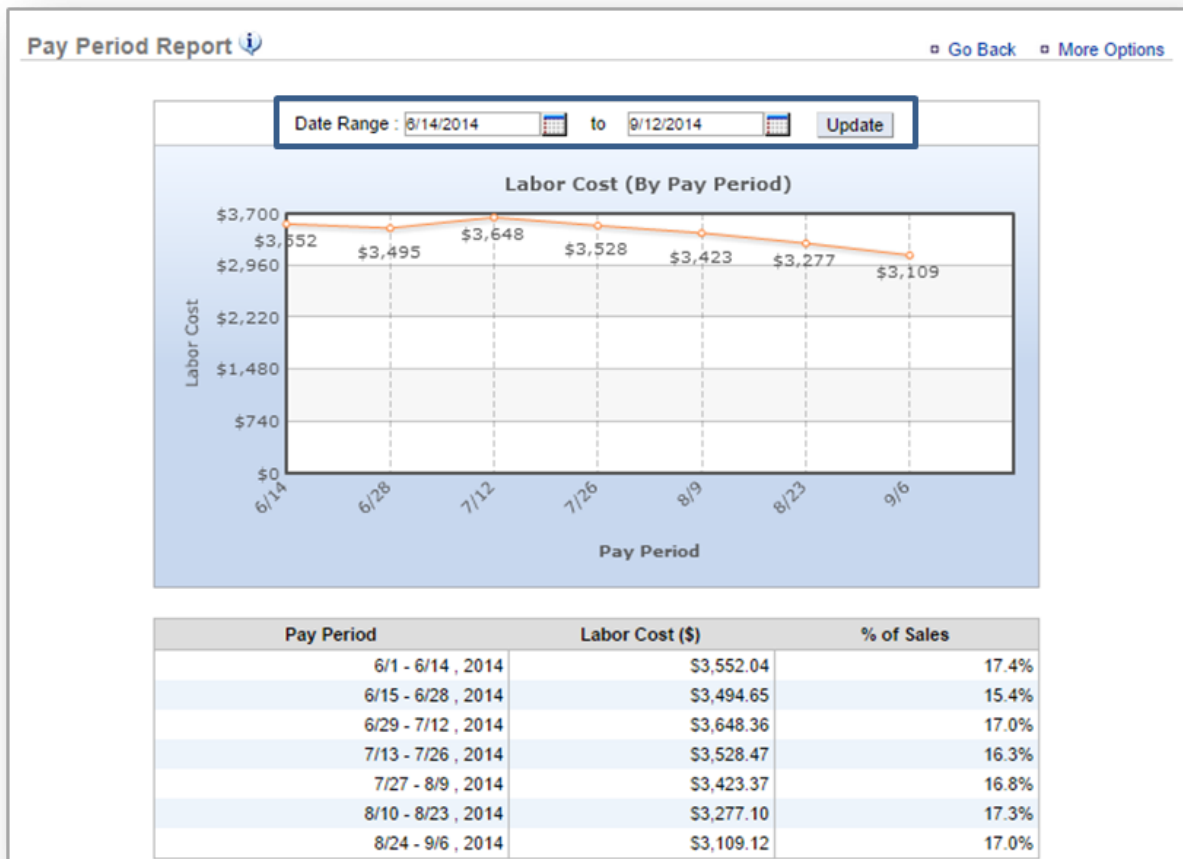
- Sales Reports**: View sales data for your store including top level metrics and product sales details.
- Daily Summary**: View a summary of sales related data for a particular day.
- Labor**: Analyze your labor costs with detailed report by time and employee.
- Inventory**: View reports of your inventory.
- Survey**: View reports of guest satisfaction surveys submitted by your customers.
- Reviews**: View reports of reviews submitted about your store.
- Other Data**: View reports on your transaction count and any custom data set up for your store.
- Key Indicators**: Run key indicator metrics for all your stores.
- Other Reports**: Run other reports for your store.
- Training**: View currently assigned training materials for your store and its progress.

STEP 2: From the *Labor Reports* screen, click ***Pay Period Report***.



STEP 3: This report will show what you spent on labor for each pay period within the date range you set. To select a date range, enter your preferred date range at the top of the page and click ***Update***.

- This report will also reflect your labor percentage against net sales.



! Did you know? You can export this report by clicking **More Options** at the top right corner of the page and then, **Export Report**.

Related Topics

[Labor Costs Report](#)

[Employee History Report](#)

[Time Card Discrepancy Report](#)

Employee History Report

The purpose of this section is to illustrate how to generate an *Employee History Report*.

Generate an Employee History Report

STEP 1: From your Dashboard view, mouse over the **Reports** tab and click **Labor**.

The screenshot shows the NCR Silver dashboard for the store "PTC Concierge Support". The "Reports" tab is selected, and the "Labor" option is highlighted in the dropdown menu. The dashboard includes sections for Alerts, Compare (Sales By Day and Sales By Week), Current Sales Performance, Links, Monthly Progress (a bar chart showing sales for Mar 17, Apr 17, and May 17), Weather Forecast, Today's Schedule, and Sales Forecast.

Alerts

Message	Date
Unrecognized Clock-In Employee from POS	5/16/2017

[View All >>](#)

Compare

Sales By Day

	Today	Prev Week	Prev Year
Sales	\$46	\$562	\$391
Checks	1	10	6
Average Check	\$45.98	\$56.22	\$65.16

[Previous Day](#)

Sales By Week

	Curr WTD	Prev WTD	Prev Yr WTD
Sales	\$106	\$575	\$456
Checks	5	11	11
Average Check	\$21.29	\$52.24	\$41.44

Current Sales Performance

	May Sales	Target	May 2016 MTD
PTC Concierge Support..	\$1,715	N/A	\$11,480
Silver Gift Shoppe	\$98	N/A	\$2,071
Silver Shopping	\$488	N/A	N/A
Total:	\$2,301	N/A	\$13,551

Monthly Progress

Bar chart showing sales for Mar 17, Apr 17, and May 17. Legend: PTC Concierge Support (blue), Silver Gift Shoppe (yellow), Silver Shopping (green).

Weather Forecast

PTC Concierge Support, Silver Gift Shoppe

Today (5/16)	Tomorrow (5/17)	Thu (5/18)
91° 63°	91° 66°	88° 66°

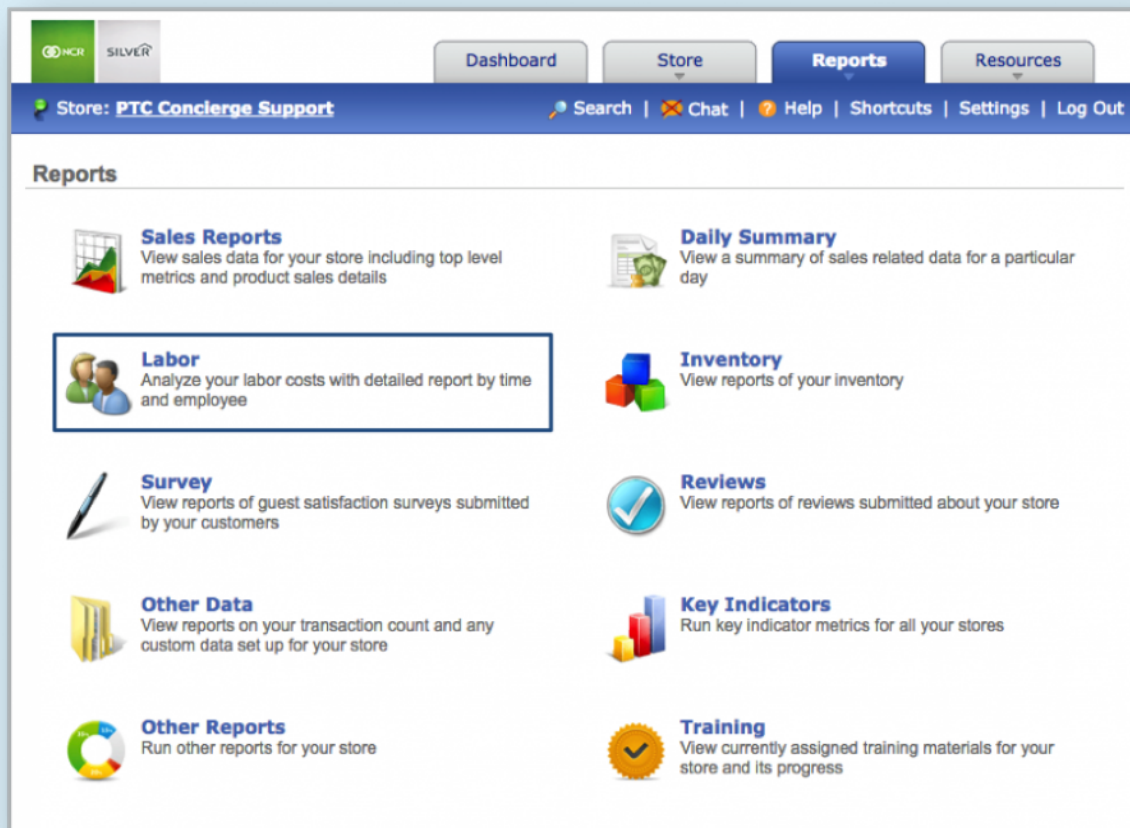
[View Full 5-Day Forecast >>](#)

Today's Schedule

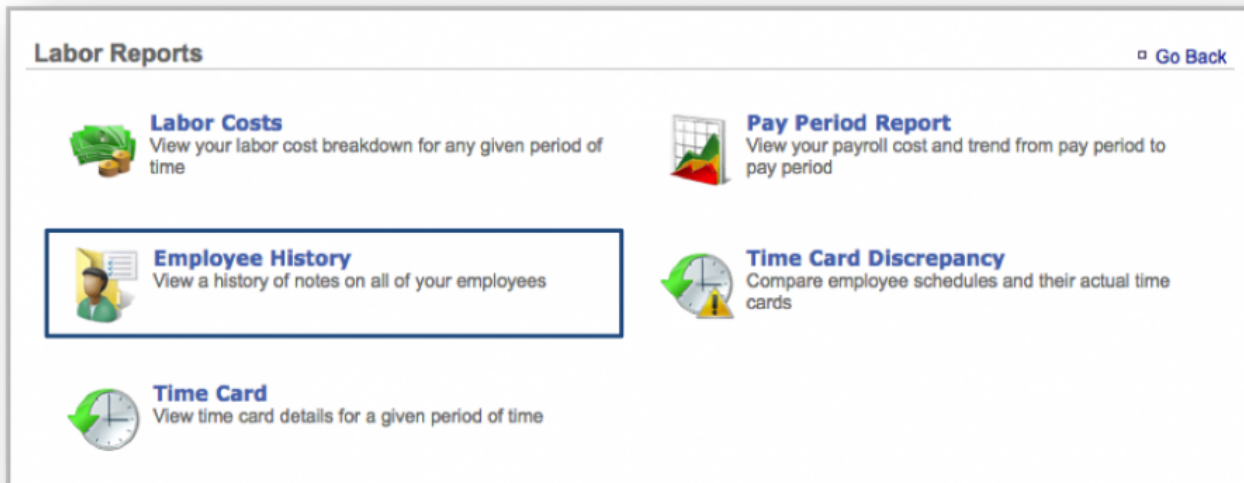
Sales Forecast

Basis	Year Sales	Week Sales
4 Weeks	\$160,562	\$3,088
8 Weeks	\$117,738	\$2,264
52 Weeks	\$365,650	\$7,032

✿ **Hint:** You can also access the *Labor* reports by clicking on the **Reports** tab and then on **Labor**.



STEP 2: From the *Labor Reports* screen, click ***Employee History***.



STEP 3: This report will show any notes that have been added for an employee (General, Positive and Negative) within the date range you set. To select a date range, enter your preferred date range at the top of the page and click ***Update***.

- To view notes on an employee, click **View Details** to the right of the employee's name.

cimplebox Dashboard Store Reports Resources

Store: **BR - Mission Grove** ★ Shortcuts | Settings | Log Out

Employee History ⓘ [Go Back](#)

Date Range: 1/31/2009 to 3/2/2011 [Update](#)

Name	General Notes	Positive Notes	Negative Notes	
Almas Almas	0	0	0	View Details >>
Audrey Tamm	0	0	0	View Details >>
Chris Anderson	0	0	0	View Details >>
Christopher Anderson	0	0	0	View Details >>
Gayle Wilson	0	0	1	View Details >>
Hilary Rice	0	0	0	View Details >>
John Smith	0	0	0	View Details >>
Joseph Smith	0	0	0	View Details >>
Kathleen Anderson	0	0	0	View Details >>
Karen Smith	1	0	0	View Details >>
Michael Smith	0	0	0	View Details >>
Robert Smith	0	0	0	View Details >>

Related Topics

[Labor Costs Report](#)

[Pay Period Report](#)

[Time Card Discrepancy Report](#)

Time Card Discrepancy

The purpose of this section is to illustrate how to generate a *Time Card Discrepancy Report*.

Generate a Time Card Discrepancy Report

STEP 1: From your Dashboard view, mouse over the **Reports** tab and click **Labor**.

The screenshot shows the NCR Silver dashboard for the store "PTC Concierge Support". The "Reports" tab is selected, and the "Labor" option is highlighted in the dropdown menu. The dashboard includes sections for Alerts, Compare (Sales By Day and Sales By Week), Current Sales Performance, Links, Monthly Progress (a bar chart showing sales for Mar 17, Apr 17, and May 17), Weather Forecast, Today's Schedule, and Sales Forecast.

Alerts

Message	Date
Unrecognized Clock-In Employee from POS	5/16/2017

[View All](#)

Compare

Sales By Day

	Today	Prev Week	Prev Year
Sales	\$46	\$562	\$391
Checks	1	10	6
Average Check	\$45.98	\$56.22	\$65.16

[Previous Day](#)

Sales By Week

	Curr WTD	Prev WTD	Prev Yr WTD
Sales	\$106	\$575	\$456
Checks	5	11	11
Average Check	\$21.29	\$52.24	\$41.44

Current Sales Performance

	May Sales	Target	May 2016 MTD
PTC Concierge Support..	\$1,715	N/A	\$11,480
Silver Gift Shoppe	\$98	N/A	\$2,071
Silver Shopping	\$488	N/A	N/A
Total:	\$2,301	N/A	\$13,551

Monthly Progress

Bar chart showing sales for Mar 17, Apr 17, and May 17. Legend: PTC Concierge Support (blue), Silver Gift Shoppe (yellow), Silver Shopping (green).

Weather Forecast

PTC Concierge Support, Silver Gift Shoppe

Today (5/16)	Tomorrow (5/17)	Thu (5/18)
91° 63°	91° 66°	88° 66°

[View Full 5-Day Forecast](#)

Today's Schedule

Sales Forecast

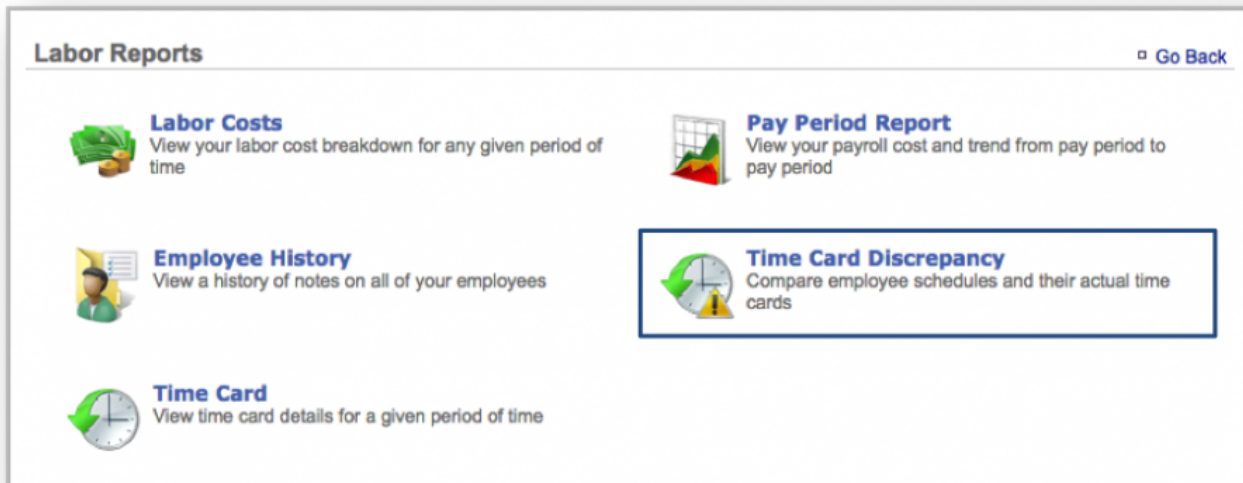
Basis	Year Sales	Week Sales
4 Weeks	\$160,562	\$3,088
8 Weeks	\$117,738	\$2,264
52 Weeks	\$365,650	\$7,032

* **Hint:** You can also access the *Labor* reports by clicking on the **Reports** tab and then on **Labor**.

The screenshot shows the NCR Silver Reports interface. At the top, there's a navigation bar with tabs for Dashboard, Store, Reports (selected), and Resources. Below this is a header bar for the store 'PTC Concierge Support' with links for Search, Chat, Help, Shortcuts, Settings, and Log Out. The main section is titled 'Reports' and contains ten report categories, each with an icon and a brief description. The 'Labor' report is highlighted with a blue border.

Report Category	Description
Sales Reports	View sales data for your store including top level metrics and product sales details
Daily Summary	View a summary of sales related data for a particular day
Labor	Analyze your labor costs with detailed report by time and employee
Inventory	View reports of your inventory
Survey	View reports of guest satisfaction surveys submitted by your customers
Reviews	View reports of reviews submitted about your store
Other Data	View reports on your transaction count and any custom data set up for your store
Key Indicators	Run key indicator metrics for all your stores
Other Reports	Run other reports for your store
Training	View currently assigned training materials for your store and its progress

STEP 2: From the *Labor Reports* screen, click ***Time Card Discrepancy***.



STEP 3: This report will show scheduled hours versus actual hours worked by your team members within the date range you set. Any discrepancies will be noted in the Difference (Hrs) column with an over or under percentage to the right of each discrepancy. From this screen, you will have the option to:

- View scheduled hours via the *Work Schedule*, by clicking on a hours total within the Scheduled Hrs column.
- View actual hours worked, by clicking on an hours total within the Actual Hrs column. Note, you will be able to edit hours worked by an employee by clicking ***Edit Time Card*** at the bottom right corner of the

employee screen. For more on *Time Cards*, click [here](#).

The screenshot displays the 'Time Card Discrepancy' report for store 'BR - Mission Grove' for the date range 2/21/2011 to 2/27/2011. The report shows a discrepancy between scheduled and actual hours for several employees. An orange arrow points from the 'Sched' column value of 18.5 for 'Catherine [redacted]' to the 'Work Schedule' view, which shows a 9-12pm shift. A green arrow points from the 'Actual' column value of 18.4 for the same employee to the 'Time Card' view, which shows clock-in and clock-out times for Friday, 2/25/2011.

Time Card Discrepancy Report

Name	Scheduled (Hrs)	Actual (Hrs)	Difference (Hrs)	Over/Under (%)
Catherine [redacted]	18.5	18.4	-0.1	-0.54%
Matthew [redacted]	18.5	17.9	-0.6	-3.24%
David [redacted]	25.5	27.3	1.8	7.06%
Tina [redacted]	18.0	18.6	0.6	3.33%
Total	80.5	82.2	1.7	2.11%

Work Schedule View

Employee	8:31 Sun	9:01 Mon	9:01 Tue	9:01 Wed	9:01 Thu	9:01 Fri	9:01 Sat	Total
Catherine [redacted]	9am - 12pm	9am - 12pm	9am - 12pm	9am - 12pm	9am - 12pm	9am - 12pm	9am - 12pm	25 hrs
Matthew [redacted]	9am - 12pm	9am - 12pm	9am - 12pm	9am - 12pm	9am - 12pm	9am - 12pm	9am - 12pm	0 hrs
David [redacted]	9am - 12pm	9am - 12pm	9am - 12pm	9am - 12pm	9am - 12pm	9am - 12pm	9am - 12pm	0 hrs
Tina [redacted]	9am - 12pm	9am - 12pm	9am - 12pm	9am - 12pm	9am - 12pm	9am - 12pm	9am - 12pm	0 hrs
Daily Total	22 hrs	27 hrs	22 hrs	22 hrs	22 hrs	25 hrs	25 hrs	153 hrs

Time Card View (Employee: Catherine [redacted])

Date	Clock In	Clock Out	Hours	Wage
Sunday, 8/31			0.00	\$0.00
Monday, 9/1			0.00	\$0.00
Tuesday, 9/2			0.00	\$0.00
Wednesday, 9/3			0.00	\$0.00
Thursday, 9/4			0.00	\$0.00
Friday, 9/5	8:00	11:52	3.52	\$29.04
Saturday, 9/6	10:00	16:23	6.23	\$51.40
Week Total			9.75	\$80.44

Time Card View (Employee: Catherine [redacted]) - Edit Mode

Date	Clock In	Clock Out	Hours	Wage
Sunday, 8/31			[Add More Shifts]	0.00 \$0.00
Monday, 9/1			[Add More Shifts]	0.00 \$0.00
Tuesday, 9/2			[Add More Shifts]	0.00 \$0.00
Wednesday, 9/3			[Add More Shifts]	0.00 \$0.00
Thursday, 9/4			[Add More Shifts]	0.00 \$0.00
Friday, 9/5	8:00	11:52	[Add More Shifts]	3.52 \$29.04
Saturday, 9/6	10:00	16:23	[Add More Shifts]	6.23 \$51.40
Week Total			9.75	\$80.44

Buttons: Enter Total Hours, Save, Save and Finish, Cancel

Related Topics

[Labor Costs Report](#)

[Pay Period Report](#)

[Employee History Report](#)

Training Reports

The purpose of this section is to illustrate how to generate a *Training Report*.



Important: Training materials, videos and certification tests are brand specific and customized to fit your brand's needs. Therefore, this section will primarily focus on how to navigate to, and generate, a training report. What you see when a report is generated will be based on your brand's specific training program.

Generate a Training Report

From your Dashboard view, mouse over the **Reports** tab and click **Training**.

The screenshot shows the NCR Silver dashboard for the store 'PTC Concierge Support'. The 'Reports' tab is selected, and a dropdown menu is open, highlighting the 'Training' option. The dashboard includes sections for Alerts, Compare (Sales By Day and Sales By Week), Current Sales Performance, Monthly Progress (a bar chart), Weather Forecast, Today's Schedule, and Sales Forecast.

Alerts

Message	Date
Unrecognized Clock-In Employee from POS	5/16/2017

[View All](#)

Compare

Sales By Day

	Today	Prev Week	Prev Year
Sales	\$46	\$562	\$391
Checks	1	10	6
Average Check	\$45.98	\$56.22	\$65.16

[Previous Day](#)

Sales By Week

	Curr WTD	Prev WTD	Prev Yr WTD
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Average Check	\$21.29	\$52.24	\$41.44

Current Sales Performance

	May Sales	Target	May 2016 MTD
PTC Concierge Suppor..	\$1,715	N/A	\$11,480
Silver Gift Shoppe	\$98	N/A	\$2,071
Silver Shopping	\$488	N/A	N/A
Total:	\$2,301	N/A	\$13,551

Monthly Progress

Bar chart showing sales for PTC Concierge Support, Silver Gift Shoppe, and Silver Shopping from March 17 to May 17. The Y-axis ranges from \$0 to \$300K. The legend indicates: PTC Concierge Support (blue), Silver Gift Shoppe (yellow), and Silver Shopping (green).

Weather Forecast

PTC Concierge Support, Silver Gift Shoppe

Today (5/16)	Tomorrow (5/17)	Thu (5/18)
91° 63°	91° 66°	88° 66°

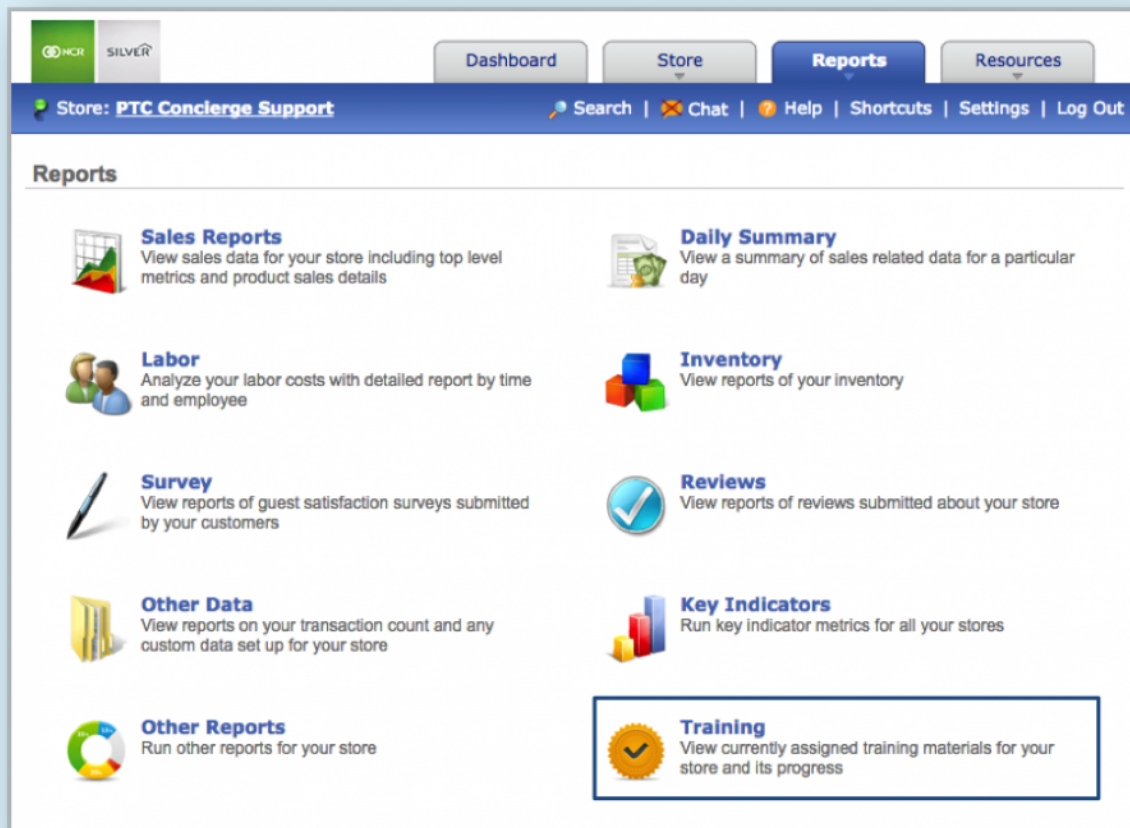
[View Full 5-Day Forecast](#)

Today's Schedule

Sales Forecast

Basis	Year Sales	Week Sales
4 Weeks	\$160,562	\$3,088
8 Weeks	\$117,738	\$2,264
52 Weeks	\$365,650	\$7,032

* **Hint:** You can also access the *Training* report by clicking on the **Reports** tab and then on **Training**.



From the *Training Reports* screen, you will see:

- A list of all current coursework.
- How many team members have been assigned specific coursework.
- How many team members have completed assigned coursework.

- A completion percentage for each course.

Training Go Back			
Class	Assigned	Completed	Percent
Recipe Creation			
Spoonable Smoothie	6	0	0.0%
Lemonade Yogurt, Lemonade Chillers & Coffee Chillers Certification Test	5	0	0.0%
Frozen Coffee Chiller Creation	6	0	0.0%
Frozen Lemonade Chiller Creation	3	0	0.0%
Caramel Apple Pie Dream Shake	5	0	0.0%
Artisan Hot Chocolate Certification Test	3	0	0.0%
Smoothie Certification Test	6	1	16.7%
Training Module Videos > Taylor Machine Operations Module			
Assembling the Taylor Machine	6	0	0.0%
Sanitizing the Taylor Machine	6	0	0.0%
Priming the Taylor Machine	6	0	0.0%
Disassembling the Taylor Machine	6	0	0.0%
Taylor Brush Cleaning	6	0	0.0%
Certification Test	6	0	0.0%

Related Topics

[Sales Reports](#)

[Inventory Reports](#)

[Product Mix Reports](#)

[Labor Reports](#)

[Survey Reports](#)

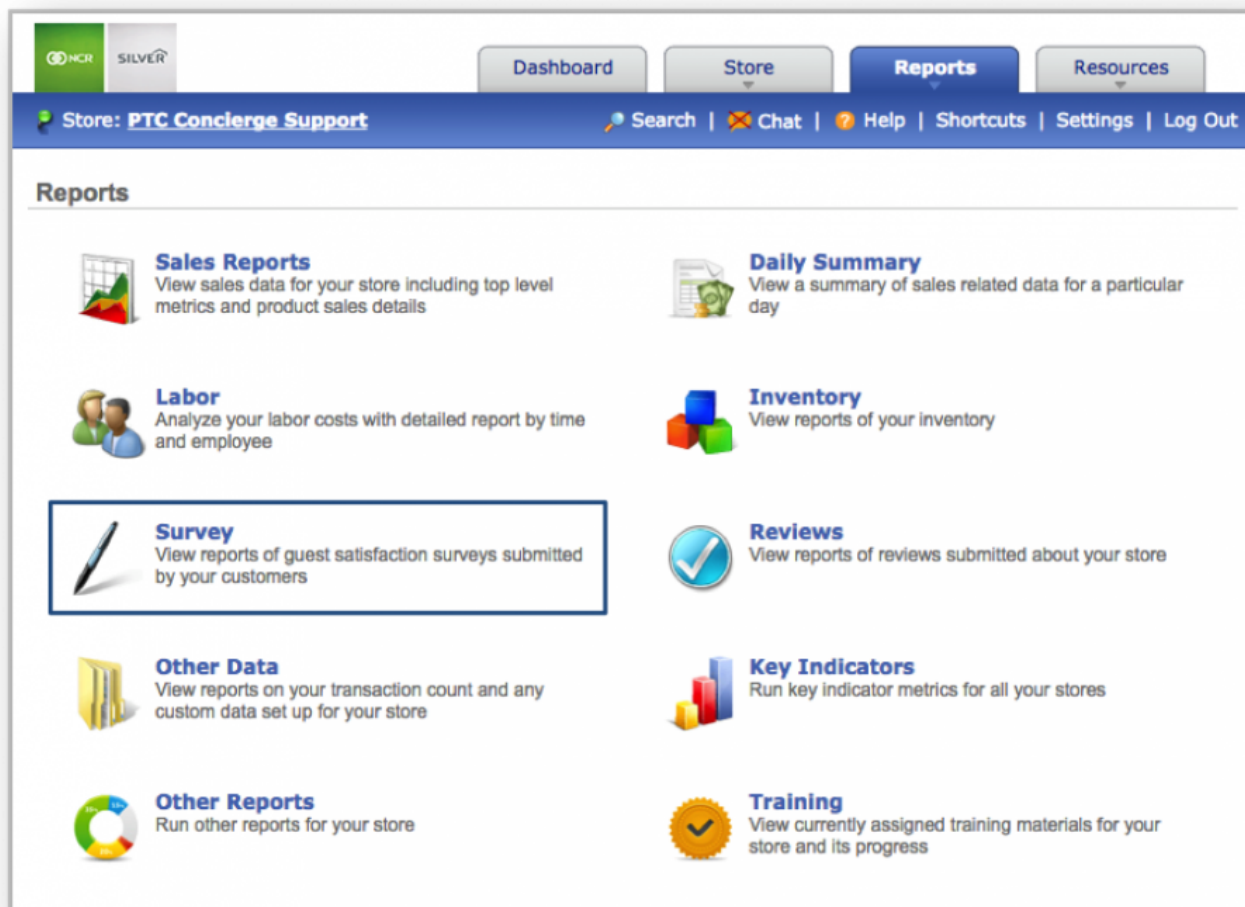
Survey Reports

The purpose of this section is to illustrate how to generate a **Survey Report**.

! **Important:** Surveys are brand specific and customized to fit your brand's needs. Therefore, this section will primarily focus on how to navigate to, and generate, a survey report. What you see when a report is generated will be based on your brand's specific survey program(s).

Generate a Survey Report

From your Dashboard view, mouse over the **Reports** tab and click **Survey**.



* **Hint:** You can also access the *Survey* reports by clicking on the **Reports** tab and then on *Survey*.

Dashboard

Store: **PTC Concierge Support** | Search | Chat | Settings | Log Out

Alerts

Message	Date
Unrecognized Clock-In Employee from POS	5/16/2017

[View All](#)

Compare

Sales By Day

	Today	Prev Week	Prev Year
Sales	\$46	\$562	\$391
Checks	1	10	6
Average Check	\$45.98	\$56.22	\$65.16

[Previous Day](#)

Sales By Week

	Curr WTD	Prev WTD	Prev Yr WTD
Sales	\$106	\$575	\$456
Checks	5	11	11
Average Check	\$21.29	\$52.24	\$41.44

Current Sales Performance

	May Sales	Target	May 2016 MTD
PTC Concierge Support	\$1,715	N/A	\$11,480
Silver Gift Shoppe	\$98	N/A	\$2,071
Silver Shopping	\$488	N/A	N/A
Total:	\$2,301	N/A	\$13,551

Monthly Progress

Bar chart showing sales for PTC Concierge Support, Silver Gift Shoppe, and Silver Shopping from Mar 17 to May 17. PTC Concierge Support is highlighted with a blue box.

Weather Forecast

PTC Concierge Support, Silver Gift Shoppe

Today (5/16)	Tomorrow (5/17)	Thu (5/18)
91° 63°	91° 66°	88° 66°

[View Full 5-Day Forecast](#)

Today's Schedule


Sales Forecast

Basis	Year Sales	Week Sales
4 Weeks	\$160,562	\$3,088
8 Weeks	\$117,738	\$2,264
52 Weeks	\$365,650	\$7,032



From the **Survey Reports** screen, you will have the option to:

- Select which survey you'd like to see. To do so, click the drop down arrow to the right of Survey to select from your list of available surveys.
- Select a date range to view.
- Search a single store or within a group of stores (if you operate multiple locations). To do this, click **Change** to the right of *Search Within* and check only those stores you wish to view results for.

- Filter your survey down to specific questions. To do this, click **Change** to the right of *Filters* and select the question you wish to view results for.
Once you have modified your search criteria, click Run Report.

Survey Report  [Go Back](#)

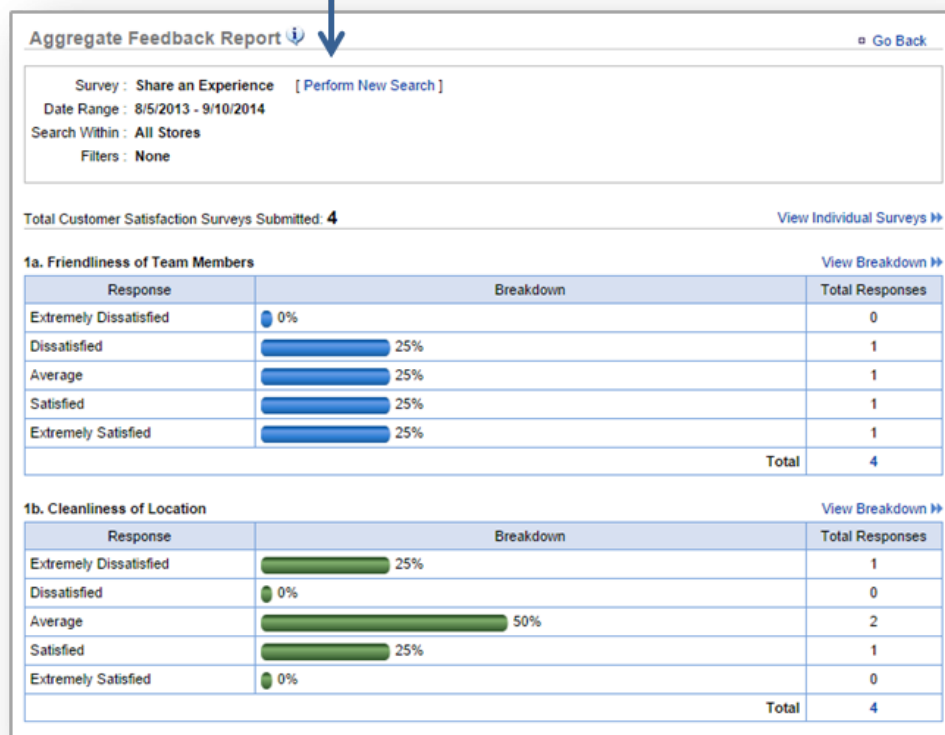
Survey : Share an Experience ▼

Date Range : 8/13/2014  to 9/12/2014 

Search Within : All Stores [\[Change \]](#)

Filters : None [\[Change \]](#)

Run Report





Note: Once you generate a survey report, you will have the option to view individual surveys or question breakdowns.

Related Topics

[Sales Reports](#)

[Inventory Reports](#)

[Product Mix Reports](#)

[Labor Reports](#)

[Training Reports](#)

Other Reports

The purpose of this section is to showcase the reports within the Other Report category. Click on a report below for more detailed information.

Please note that based on your brand's chosen solution, there may be reports that are not visible on your platform.

[Discount Details Report](#)

[Discounts by Employee Report](#)

[Employee Productivity Report](#)

[Red Flag Report](#)

[Shift Details Report](#)

[Store Productivity Report](#)

[Summary Report](#)

[Tender Type Report](#)

Discount Details Report

The purpose of this section is to showcase the Discount Details Report, which provides you with your store's discount details for any date range you specify.

Generating the Discount Details Report

STEP 1: From your Dashboard view, mouse over the **Reports** tab and click **Other Reports**.

The screenshot shows the NCR Silver dashboard for the store "PTC Concierge Support". The "Reports" tab is selected, and the "Other Reports" option is highlighted in the dropdown menu. The dashboard includes sections for Alerts, Compare (Sales By Day and Sales By Week), Current Sales Performance, Monthly Progress (with a bar chart), Weather Forecast, Today's Schedule, and Sales Forecast.

Alerts

Message	Date
Unrecognized Clock-In Employee from POS	5/16/2017

[View All](#)

Compare

Sales By Day

	Today	Prev Week	Prev Year
Sales	\$46	\$562	\$391
Checks	1	10	6
Average Check	\$45.98	\$56.22	\$65.16

[Previous Day](#)

Sales By Week

	Curr WTD	Prev WTD	Prev Yr WTD
Sales	\$106	\$575	\$456
Checks	5	11	11
Average Check	\$21.29	\$52.24	\$41.44

Current Sales Performance

	May Sales	Target	May 2016 MTD
PTC Concierge Support..	\$1,715	N/A	\$11,480
Silver Gift Shoppe	\$98	N/A	\$2,071
Silver Shopping	\$488	N/A	N/A
Total:	\$2,301	N/A	\$13,551

Monthly Progress

Bar chart showing sales for PTC Concierge Support, Silver Gift Shoppe, and Silver Shopping from March 17 to May 17. The Y-axis ranges from \$0 to \$300K. The X-axis shows the months Mar 17, Apr 17, and May 17. The legend indicates: PTC Concierge Support (blue), Silver Gift Shoppe (yellow), and Silver Shopping (green).

Weather Forecast

PTC Concierge Support, Silver Gift Shoppe

Today (5/16)	Tomorrow (5/17)	Thu (5/18)
91° 63°	91° 66°	88° 66°

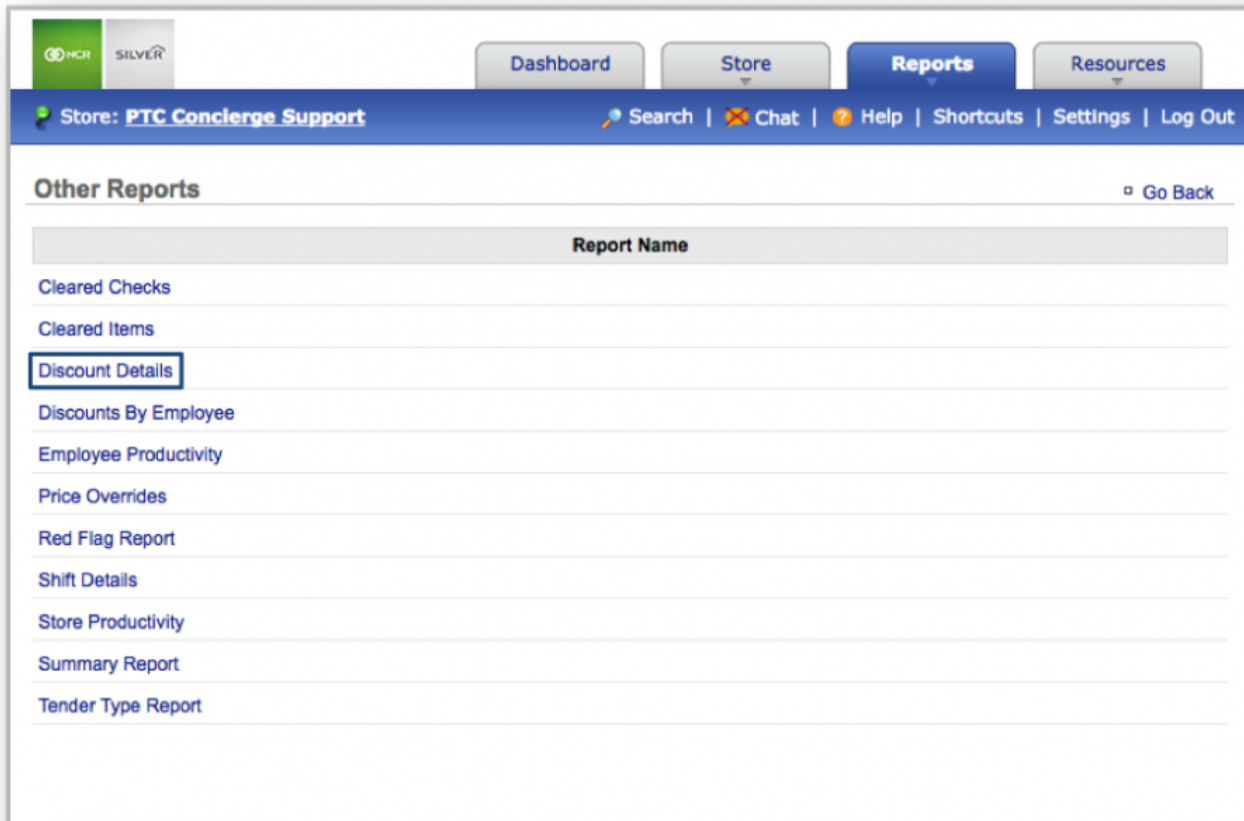
[View Full 5-Day Forecast](#)

Today's Schedule

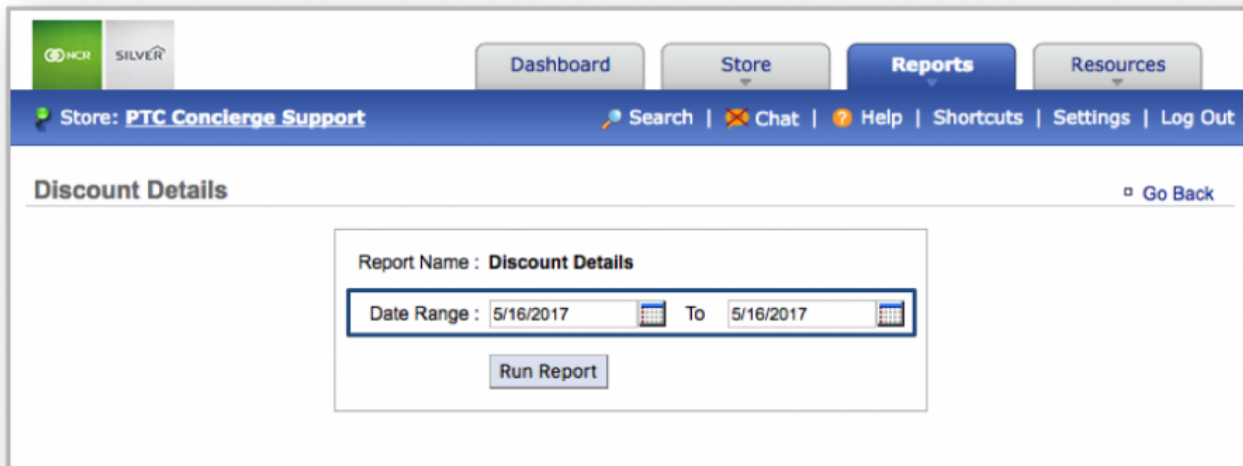
Sales Forecast

Basis	Year Sales	Week Sales
4 Weeks	\$160,562	\$3,088
8 Weeks	\$117,738	\$2,264
52 Weeks	\$365,650	\$7,032

STEP 2: Within ***Other Reports***, click ***Discount Details***.



STEP 3: Select your preferred data range and click ***Run Report***.



The screenshot shows the NCR Silver web interface. At the top, there are navigation tabs: Dashboard, Store, Reports (highlighted), and Resources. Below the tabs is a blue header bar with the text "Store: PTC Concierge Support" and links for Search, Chat, Help, Shortcuts, Settings, and Log Out. The main content area is titled "Discount Details" with a "Go Back" link. In the center, there is a form with the following fields:

- Report Name : **Discount Details**
- Date Range : To
-

Discount Details

Once the report is generated, discounts will be listed to the left, under *Discount Name*. Each discount is

broken down into further details, shown to the right.

Dashboard

Store

Reports

Resources

Store: **PTC Concierge Support**

Search

Chat

Help

Shortcuts

Settings

Log Out

Discounts

Go Back

More Options

Date Range: 4/16/2017 - 5/16/2017

Change

Export

Discount Name	Applies To	Quantity	Sales Before Discount	Discount	Sales After Discount	Ticket Total After Discount
\$1 Off	Ticket	2	\$14.99	\$1.00 (7%)	\$13.99	\$13.99
\$1 OFF Item	Line	3	\$82.50	\$3.00 (4%)	\$79.50	\$1,708.59
10% off	Ticket	2	\$15.50	\$1.55 (10%)	\$13.95	\$13.95
10% off Ticket	Ticket	13	\$169.52	\$16.80 (10%)	\$152.72	\$151.22
15%	Line	1	\$16.50	\$2.47 (15%)	\$14.03	\$12.63
25% off Item	Line	10	\$51.91	\$14.35 (28%)	\$37.56	\$272.54
50% Off Discount	Ticket	6	\$40.99	\$20.49 (50%)	\$20.50	\$20.50
BOGO SERVICES	Line	33	\$480.00	\$480.00 (100%)	\$0.00	\$700.12
Dollar off	Ticket	2	\$12.00	\$1.00 (8%)	\$11.00	\$11.00
Employee Meal	Ticket	14	\$254.48	\$127.23 (50%)	\$127.25	\$127.25
Free Pie	Ticket	0	\$0.00	\$0.00 (0%)	\$0.00	\$0.00
Total		86	\$1,138.39	\$667.89	\$470.50	\$3,031.79

Hint: You can change your date range from a generated report by clicking **Change** to the right of **Date Range**.
Did you know? You can export this report by clicking **More Options** at the top right corner of the page and then, **Export**.

Related Topics within Other Reports

[Discounts by Employee Report](#)

[Employee Productivity Report](#)

[Red Flag Report](#)

[Shift Details Report](#)

[Store Productivity Report](#)

[Summary Report](#)

[Tender Type Report](#)

Discounts by Employee Report

The purpose of this section is to showcase the Discounts by Employee Report, which provides you with your store's discounts by employee data for any date range you specify.

Generating the Discounts by Employee Report

STEP 1: From your Dashboard view, mouse over the **Reports** tab and click **Other Reports**.

The screenshot shows the NCR Silver dashboard for the store "PTC Concierge Support". The "Reports" tab is selected, and the "Other Reports" option is highlighted in the dropdown menu. The dashboard includes sections for Alerts, Compare (Sales By Day and Sales By Week), Current Sales Performance, Monthly Progress (with a bar chart), Weather Forecast, Today's Schedule, and Sales Forecast.

Alerts

Message	Date
Unrecognized Clock-In Employee from POS	5/16/2017

[View All](#)

Compare

Sales By Day

	Today	Prev Week	Prev Year
Sales	\$46	\$562	\$391
Checks	1	10	6
Average Check	\$45.98	\$56.22	\$65.16

[Previous Day](#)

Sales By Week

	Curr WTD	Prev WTD	Prev Yr WTD
Sales	\$106	\$575	\$456
Checks	5	11	11
Average Check	\$21.29	\$52.24	\$41.44

Current Sales Performance

	May Sales	Target	May 2016 MTD
PTC Concierge Support..	\$1,715	N/A	\$11,480
Silver Gift Shoppe	\$98	N/A	\$2,071
Silver Shopping	\$488	N/A	N/A
Total:	\$2,301	N/A	\$13,551

Monthly Progress

Bar chart showing sales for PTC Concierge Support, Silver Gift Shoppe, and Silver Shopping from March 17 to May 17. The Y-axis ranges from \$0 to \$300K. The X-axis shows the months Mar 17, Apr 17, and May 17. A legend indicates: PTC Concierge Support (blue), Silver Gift Shoppe (yellow), and Silver Shopping (green).

Weather Forecast

PTC Concierge Support, Silver Gift Shoppe

Today (5/16)	Tomorrow (5/17)	Thu (5/18)
91° 63°	91° 66°	88° 66°

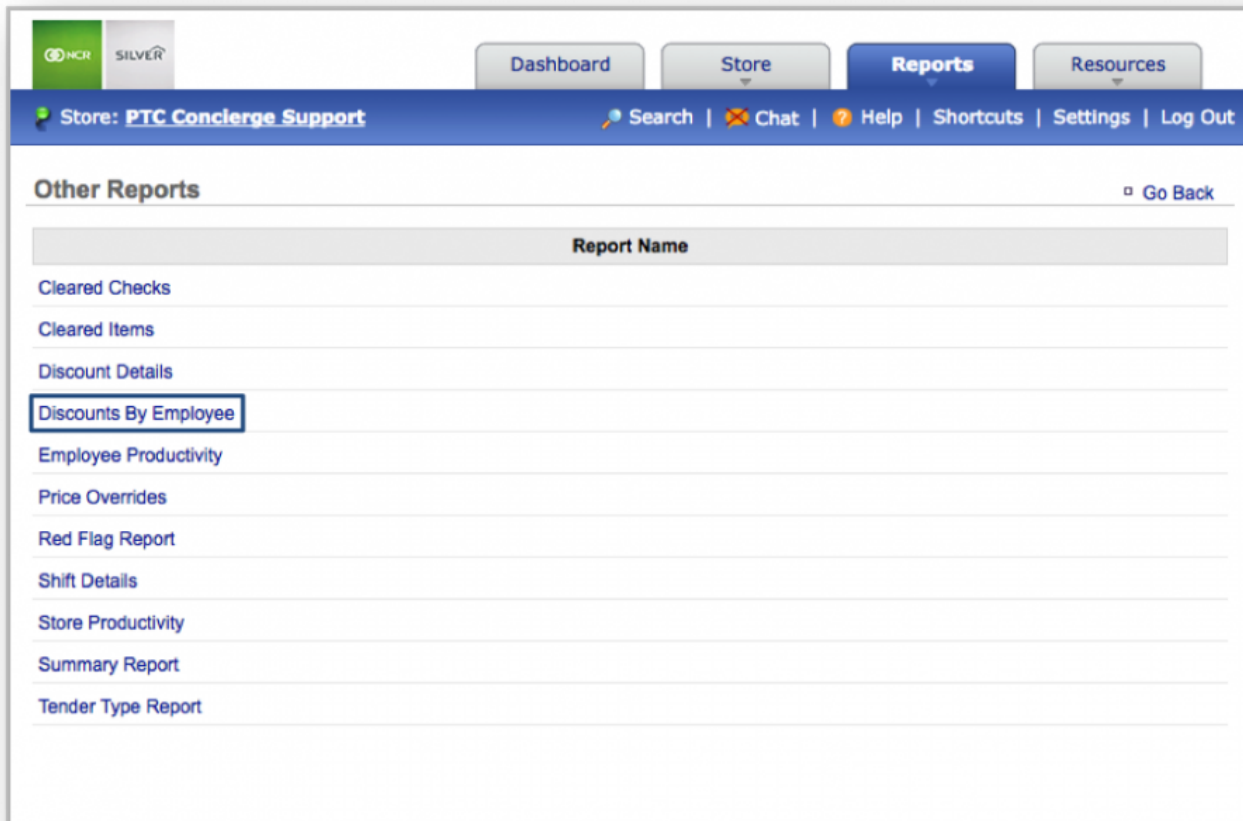
[View Full 5-Day Forecast](#)

Today's Schedule

Sales Forecast

Basis	Year Sales	Week Sales
4 Weeks	\$160,562	\$3,088
8 Weeks	\$117,738	\$2,264
52 Weeks	\$365,650	\$7,032

STEP 2: Within **Other Reports**, click **Discounts By Employee**.



STEP 3: Select your preferred data range and click **Run Report**.

Report Name : Discounts By Employee

Date Range : 5/8/2017 To 6/7/2017

Run Report

Discounts by Employee

Once the report is generated, employee names will be listed to the left, under *Employee*. To the right are discount details associated with that employee.

Date Range: 5/8/2017 - 6/7/2017 [Change]

Employee	Net Quantity	Net Discounts	Net Sales	Avg Net Discount	Avg Net Sale	Net Invoices
Amber Kelley	38	\$429.50	\$716.74	\$11.30	\$59.73	12
Dana Perryman	2	\$5.16	\$37.75	\$2.58	\$12.58	3
dwyan clark	21	\$151.23	\$378.71	\$7.20	\$34.43	11
Rondy	6	\$21.30	\$1,331.68	\$3.55	\$95.12	14
Total	67	\$607.19	\$2,464.88	\$9.06	\$61.62	40

More Options: Print, Export



Hint: You can change your date range from a generated report by clicking **Change** to the right of **Date Range**.

Did you know? You can export this report by clicking **More Options** at the top right corner of the page and then, **Export**.

Related Topics within Other Reports

[Discount Details Report](#)

[Employee Productivity Report](#)

[Red Flag Report](#)

[Shift Details Report](#)

[Store Productivity Report](#)

[Summary Report](#)

[Tender Type Report](#)

Employee Productivity Report

The purpose of this section is to showcase the Employee Productivity Report, which provides you with employee productivity data for any date range you specify.

Generating the Employee Productivity Report

STEP 1: From your Dashboard view, mouse over the **Reports** tab and click **Other Reports**.

The screenshot shows the NCR Silver dashboard for the store "PTC Concierge Support". The "Reports" tab is selected, and the "Other Reports" option is highlighted in the dropdown menu. The dashboard includes sections for Alerts, Compare (Sales By Day and Sales By Week), Current Sales Performance, Monthly Progress (with a bar chart), Weather Forecast, Today's Schedule, and Sales Forecast.

Alerts

Message	Date
Unrecognized Clock-In Employee from POS	5/16/2017

[View All](#)

Compare

Sales By Day

	Today	Prev Week	Prev Year
Sales	\$46	\$562	\$391
Checks	1	10	6
Average Check	\$45.98	\$56.22	\$65.16

[Previous Day](#)

Sales By Week

	Curr WTD	Prev WTD	Prev Yr WTD
Sales	\$106	\$575	\$456
Checks	5	11	11
Average Check	\$21.29	\$52.24	\$41.44

Current Sales Performance

	May Sales	Target	May 2016 MTD
PTC Concierge Support..	\$1,715	N/A	\$11,480
Silver Gift Shoppe	\$98	N/A	\$2,071
Silver Shopping	\$488	N/A	N/A
Total:	\$2,301	N/A	\$13,551

Monthly Progress

Bar chart showing sales for PTC Concierge Support (blue), Silver Gift Shoppe (yellow), and Silver Shopping (green) from March 17 to May 17. The Y-axis ranges from \$0 to \$300K. A bar for PTC Concierge Support in March 17 is labeled \$256.1K. Data for May 17: Silver Gift Shoppe (\$1.7K), Silver Shopping (\$97.6), and PTC Concierge Support (\$488.3).

Weather Forecast

PTC Concierge Support, Silver Gift Shoppe

Today (5/16)	Tomorrow (5/17)	Thu (5/18)
91° 63°	91° 66°	88° 66°

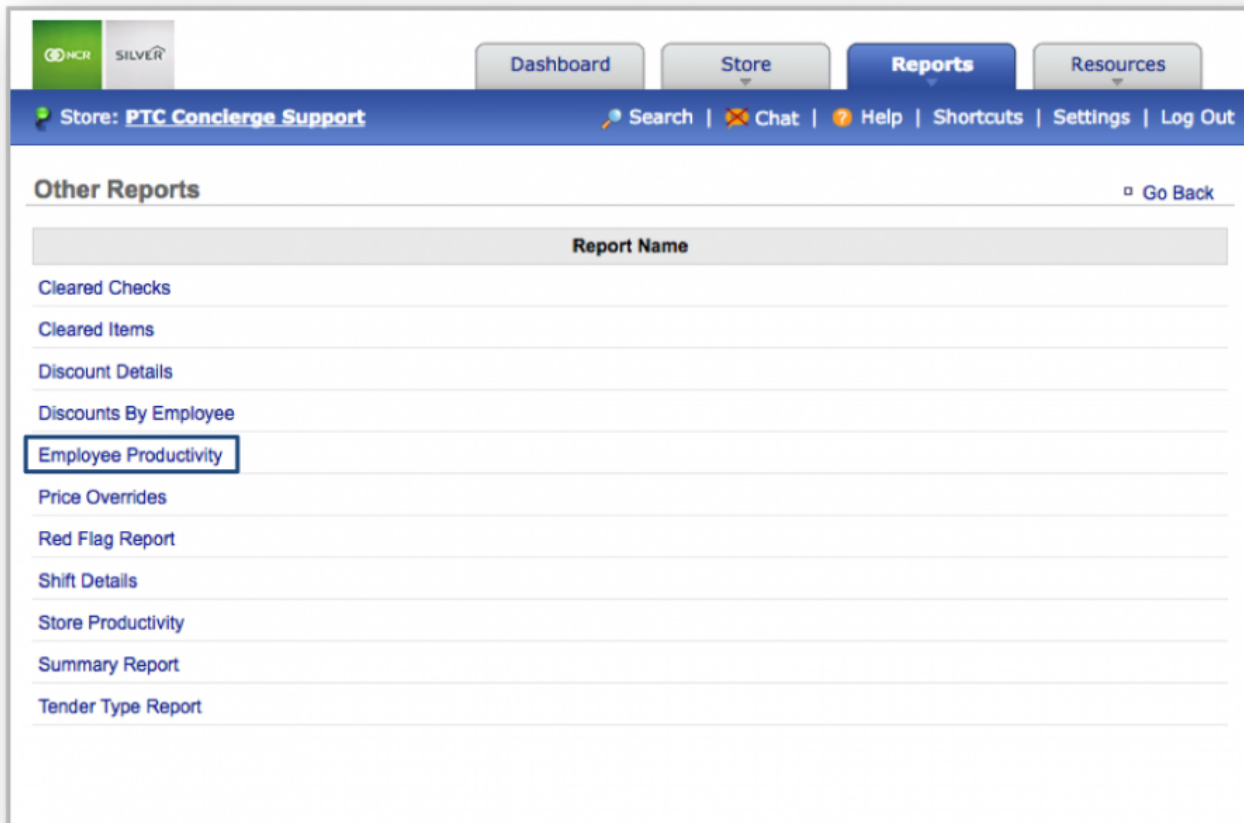
[View Full 5-Day Forecast](#)

Today's Schedule

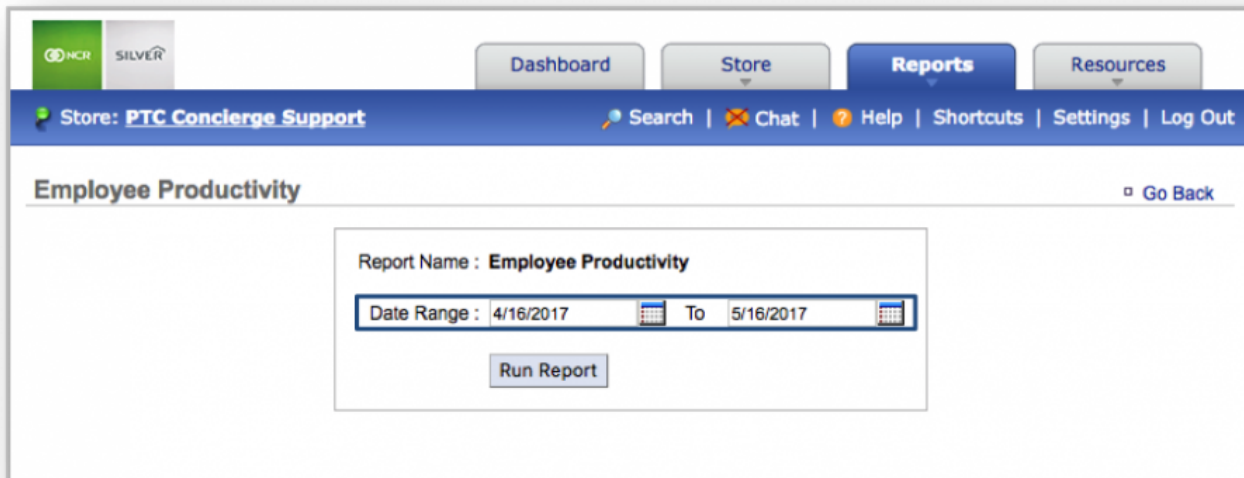
Sales Forecast

Basis	Year Sales	Week Sales
4 Weeks	\$160,562	\$3,088
8 Weeks	\$117,738	\$2,264
52 Weeks	\$365,650	\$7,032

STEP 2: Within **Other Reports**, click **Employee Productivity**.



STEP 3: Select your preferred data range and click **Run Report**.

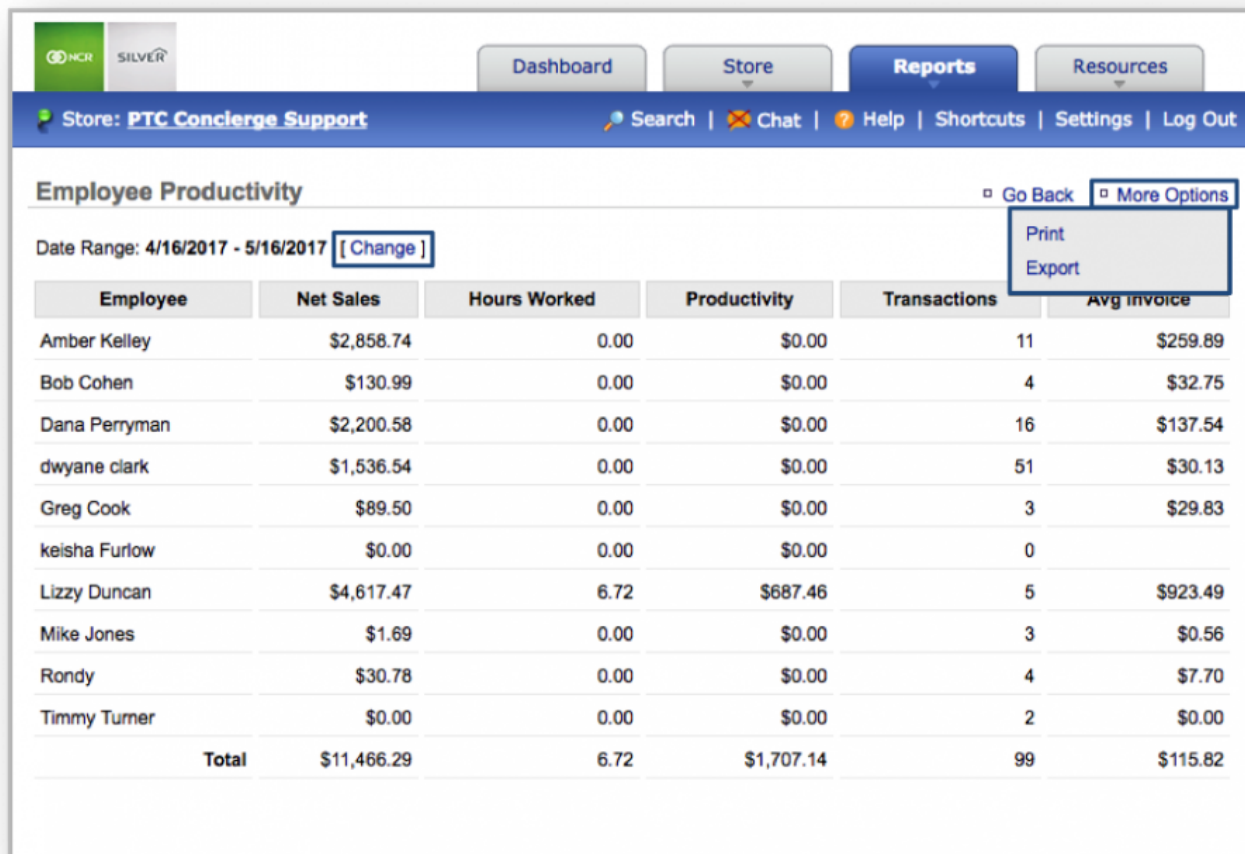


The screenshot shows a web application interface for generating reports. At the top, there is a navigation bar with tabs for 'Dashboard', 'Store', 'Reports', and 'Resources'. The 'Reports' tab is currently selected. Below the navigation bar, a blue header bar displays 'Store: PTC Concierge Support' on the left and a series of links (Search, Chat, Help, Shortcuts, Settings, Log Out) on the right. The main content area is titled 'Employee Productivity' with a 'Go Back' link on the right. In the center, there is a form box containing the following elements: 'Report Name : Employee Productivity', a 'Date Range' section with two date pickers (the first is set to 4/16/2017 and the second to 5/16/2017), and a 'Run Report' button at the bottom.

Employee Productivity

Once the report is generated, employee names will be listed to the left, under *Employee*. To the right are productivity details associated with that employee (calculated by net sales to hours worked, with additional

details such as transactions and average invoice totals).



Employee Productivity Go Back More Options

Date Range: 4/16/2017 - 5/16/2017 [Change]

Employee	Net Sales	Hours Worked	Productivity	Transactions	Avg Invoice
Amber Kelley	\$2,858.74	0.00	\$0.00	11	\$259.89
Bob Cohen	\$130.99	0.00	\$0.00	4	\$32.75
Dana Perryman	\$2,200.58	0.00	\$0.00	16	\$137.54
dwyane clark	\$1,536.54	0.00	\$0.00	51	\$30.13
Greg Cook	\$89.50	0.00	\$0.00	3	\$29.83
keisha Furlow	\$0.00	0.00	\$0.00	0	
Lizzy Duncan	\$4,617.47	6.72	\$687.46	5	\$923.49
Mike Jones	\$1.69	0.00	\$0.00	3	\$0.56
Rondy	\$30.78	0.00	\$0.00	4	\$7.70
Timmy Turner	\$0.00	0.00	\$0.00	2	\$0.00
Total	\$11,466.29	6.72	\$1,707.14	99	\$115.82

Print
Export

* **Hint:** You can change your date range from a generated report by clicking **Change** to the right of **Date Range**.
Did you know? You can export this report by clicking **More Options** at the top right corner of the page and then, **Export**.

Related Topics within Other Reports

[Discount Details Report](#)

[Discounts by Employee Report](#)

[Red Flag Report](#)

[Shift Details Report](#)

[Store Productivity Report](#)

[Summary Report](#)

[Tender Type Report](#)

Red Flag Report

The purpose of this section is to showcase the Red Flag Report, which provides you with red flag data (including, but not limited to, average invoice amounts, discount quantities, discount amounts, cleared ticket information, refunds, etc...) for any date range you specify.

Generating the Red Flag Report

STEP 1: From your Dashboard view, mouse over the **Reports** tab and click **Other Reports**.

Dashboard

Store: **PTC Concierge Support** | Search | Chat | Settings | Log Out

Alerts

Message	Date
Unrecognized Clock-In Employee from POS	5/16/2017

[View All](#)

Compare

Sales By Day

	Today	Prev Week	Prev Year
Sales	\$46	\$562	\$391
Checks	1	10	6
Average Check	\$45.98	\$56.22	\$65.16

[Previous Day](#)

Sales By Week

	Curr WTD	Prev WTD	Prev Yr WTD
Sales	\$106	\$575	\$456
Checks	5	11	11
Average Check	\$21.29	\$52.24	\$41.44

Current Sales Performance

	May Sales	Target	May 2016 MTD
PTC Concierge Support..	\$1,715	N/A	\$11,480
Silver Gift Shoppe	\$98	N/A	\$2,071
Silver Shopping	\$488	N/A	N/A
Total:	\$2,301	N/A	\$13,551

Reports

- Sales Reports
- Daily Summary
- Labor
- Inventory
- Survey
- Reviews
- Other Data
- Key Indicators**
- Other Reports**
- Training

Monthly Progress

Bar chart showing sales for PTC Concierge Support, Silver Gift Shoppe, and Silver Shopping from Mar 17 to May 17. PTC Concierge Support is highlighted with a value of \$256.1K.

Weather Forecast

PTC Concierge Support, Silver Gift Shoppe

Today (5/16)	Tomorrow (5/17)	Thu (5/18)
91° 63°	91° 66°	88° 66°

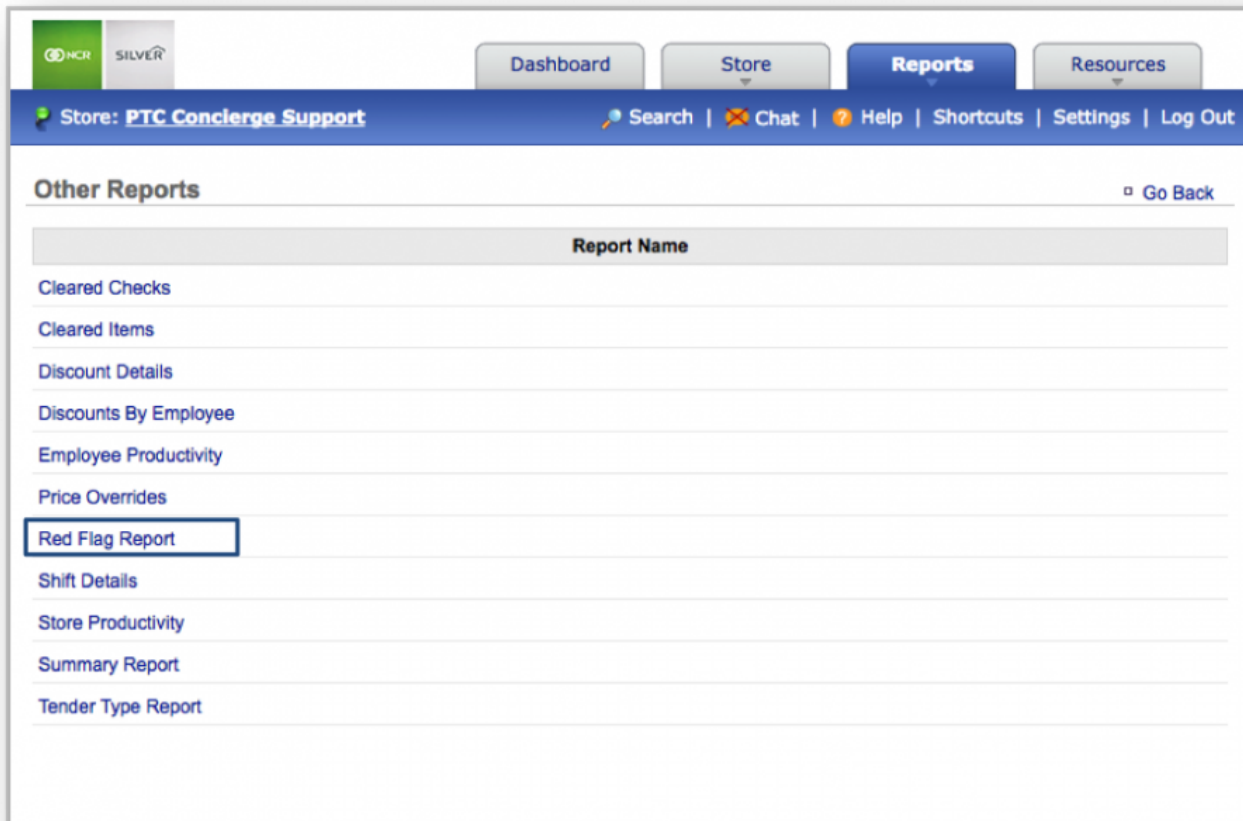
[View Full 5-Day Forecast](#)

Today's Schedule

Sales Forecast

Basis	Year Sales	Week Sales
4 Weeks	\$160,562	\$3,088
8 Weeks	\$117,738	\$2,264
52 Weeks	\$365,650	\$7,032

STEP 2: Within **Other Reports**, click **Red Flag Report**.



STEP 3: Select your preferred data range and click ***Run Report***.



The screenshot shows the PTC Concierge Support web application interface. At the top, there is a navigation bar with tabs for Dashboard, Store, Reports, and Resources. Below this, a blue header bar displays the store name 'Store: PTC Concierge Support' and links for Search, Chat, Help, Shortcuts, Settings, and Log Out. The main content area is titled 'Red Flag Report' with a 'Go Back' link. A form is displayed with the following fields:

- Report Name : **Red Flag Report**
- Date Range : To
-

Red Flag Report

Once the report is generated, employee names will be listed to the left, under *Name*. To the right are details associated with that employee (which include invoice, discount, cleared ticket, refund and price change

information) for the date range you set.




Dashboard

Store

Reports

Resources

Store: **PTC Concierge Support**

 Search |
 Chat |
 Help |
Shortcuts |
Settings |
Log Out

Red Flag Report

Go Back
More Options

Print
Export

Date Range: 4/16/2017 - 5/16/2017 [\[Change\]](#)

Name	Invoices Qty	Average Invoice Amt	Discount Qty	Discount Amt	Net Discount %	Cleared Check Qty	Cleared Check Amt	Refund Qty	Refund Amt	Price Change Qty	Price Change Amt	Clear Item Qty	Clear Item Amt
Amber Kelley	11	\$259.89	33	\$476.35	16.7%	4	\$56.36	1	\$50.50	-1	\$0.00	4	\$27
Bob Cohen	4	\$32.75	1	\$1.00	0.8%	0	\$0.00	0	\$0.00	0	\$0.00	1	\$0
Dana Perryman	16	\$137.54	2	\$26.24	1.2%	5	\$270.46	6	\$110.91	0	\$0.00	4	\$103
dwyanedark	51	\$30.13	15	\$163.30	10.6%	22	\$1,001.35	3	\$26.50	0	\$0.00	34	\$340
Greg Cook	3	\$29.83	0	\$0.00	0.0%	0	\$0.00	0	\$0.00	0	\$0.00	1	\$10
keisha Furlow	0		0	\$0.00		1	\$6.17	0	\$0.00	0	\$0.00	0	\$0
Lizzy Duncan	5	\$923.49	1	\$1.00	0.0%	1	\$0.00	0	\$0.00	1	(\$30.00)	8	\$899
Mike Jones	3	\$0.56	0	\$0.00	0.0%	4	\$39.54	1	\$50.50	0	\$0.00	2	\$6
Rondy	4	\$7.70	0	\$0.00	0.0%	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0
Timmy Turner	2	\$0.00	0	\$0.00		0	\$0.00	1	\$12.99	0	\$0.00	0	\$0
Total	99	\$115.82	52	\$667.89	5.8%	37	\$1,373.88	12	\$251.40	0	(\$30.00)	54	\$1,387

Hint: You can change your date range from a generated report by clicking **Change** to the right of **Date Range**.

Did you know? You can export this report by clicking **More Options** at the top right corner of the page and then, **Export**.

Related Topics within Other Reports

Discount Details Report

Discounts by Employee Report

Employee Productivity Report

Shift Details Report

Store Productivity Report

Summary Report

Tender Type Report

Shift Details Report

The purpose of this section is to showcase the Shift Details Report, which provides you with shift detail information (specifically, over/short amounts, pay in/pay out totals, and cash deposit information) for any date range you specify.

Generating the Shift Details Report

STEP 1: From your Dashboard view, mouse over the **Reports** tab and click **Other Reports**.

Dashboard

Store: **PTC Concierge Support** | Search | Chat | Settings | Log Out

Alerts

Message	Date
Unrecognized Clock-In Employee from POS	5/16/2017

[View All](#)

Compare

Sales By Day

	Today	Prev Week	Prev Year
Sales	\$46	\$562	\$391
Checks	1	10	6
Average Check	\$45.98	\$56.22	\$65.16

[Previous Day](#)

Sales By Week

	Curr WTD	Prev WTD	Prev Yr WTD
Sales	\$106	\$575	\$456
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Current Sales Performance

	May Sales	Target	May 2016 MTD
PTC Concierge Support..	\$1,715	N/A	\$11,480
Silver Gift Shoppe	\$98	N/A	\$2,071
Silver Shopping	\$488	N/A	N/A
Total:	\$2,301	N/A	\$13,551

Monthly Progress

Bar chart showing sales for Mar 17, Apr 17, and May 17. Legend: PTC Concierge Support (blue), Silver Gift Shoppe (yellow), Silver Shopping (green).

Weather Forecast

PTC Concierge Support, Silver Gift Shoppe

Today (5/16)	Tomorrow (5/17)	Thu (5/18)
91° 63°	91° 66°	88° 66°

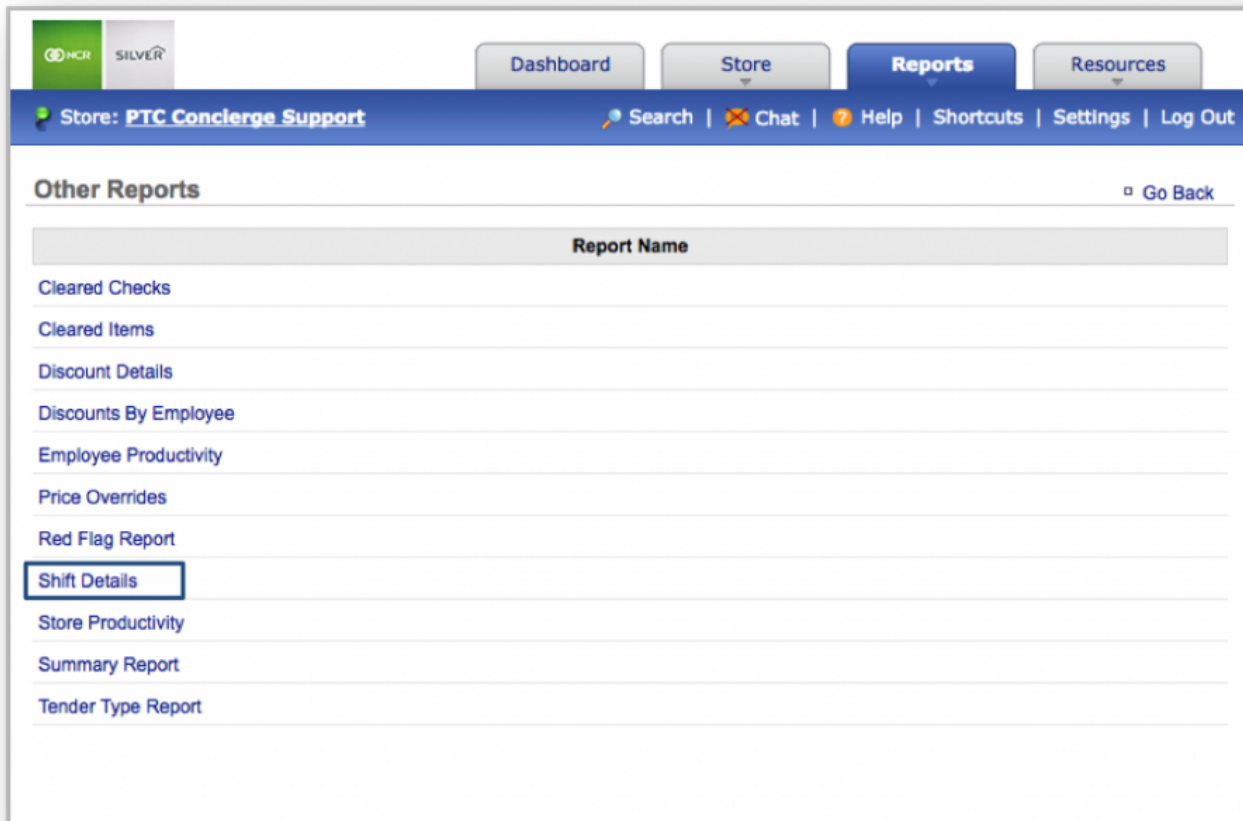
[View Full 5-Day Forecast](#)

Today's Schedule

Sales Forecast

Basis	Year Sales	Week Sales
4 Weeks	\$160,562	\$3,088
8 Weeks	\$117,738	\$2,264
52 Weeks	\$365,650	\$7,032

STEP 2: Within **Other Reports**, click **Shift Details**.



STEP 3: Select your preferred data range and click **Run Report**.

The screenshot displays the PTC Concierge Support web application interface. At the top, there is a navigation bar with tabs for Dashboard, Store, Reports, and Resources. Below this, a blue header bar contains the text "Store: PTC Concierge Support" and links for Search, Chat, Help, Shortcuts, Settings, and Log Out. The main content area is titled "Shift Details" and includes a "Go Back" link. A form within this area is used to configure the report. It shows "Report Name : Shift Details" and a "Date Range" section with two date pickers set to "4/16/2017" and "5/16/2017". A "Run Report" button is located below the date range fields.

Shift Details

Once the report is generated, shift times and employee names will be listed to the left of the screen. To the

right are the shift details associated with each employee for the date range you set.

Date	Start	End	Device	Employee	Over/Short	Pay In Qty	Pay In Amount	Pay Out Qty	Pay Out Amount	Cash Deposit Qty	Cash Deposit Amount
5/15/2017	5/15/2017 11:20 AM	5/15/2017 11:22 AM	Amber	Amber Kelley	\$234.80	0	\$0.00	0	\$0.00	1	\$234.80
5/15/2017	5/15/2017 11:23 AM	5/15/2017 11:24 AM	Amber	Amber Kelley	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00
5/9/2017	5/9/2017 8:47 AM	5/9/2017 8:47 AM	Amber	Amber Kelley	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00
5/9/2017	5/9/2017 11:00 AM	5/9/2017 11:07 AM	Amber	Amber Kelley	(\$9.87)	0	\$0.00	0	\$0.00	1	\$459.53
5/9/2017	5/9/2017 11:27 AM	5/11/2017 4:43 PM	Amber	Amber Kelley	(\$50.00)	1	\$50.00	0	\$0.00	0	\$0.00
5/1/2017	5/1/2017 8:40 AM	5/1/2017 8:46 AM	Amber	Amber Kelley	(\$2.97)	0	\$0.00	0	\$0.00	1	\$81.30
4/28/2017	4/28/2017 3:02 PM	4/28/2017 3:11 PM	Amber	Amber Kelley	\$309.12	0	\$0.00	0	\$0.00	1	\$369.36
4/20/2017	4/20/2017 10:25 AM	4/21/2017 9:11 AM	T T TTia	dwyane clark	\$1,150.66	0	\$0.00	0	\$0.00	1	\$1,212.00
4/19/2017	4/19/2017 8:29 AM	4/21/2017 3:25 PM	Silver's iPad	dwyane clark	\$450.00	0	\$0.00	0	\$0.00	1	\$450.00
4/19/2017	4/19/2017 1:27 PM	4/20/2017 10:23 AM	T T TTia	dwyane clark	\$238.83	0	\$0.00	0	\$0.00	1	\$323.50



Hint: You can change your date range from a generated report by clicking **Change** to the right of **Date Range**.

Did you know? You can export this report by clicking **More Options** at the top right corner of the page and then, **Export**.

Related Topics within Other Reports

[Discount Details Report](#)

[Discounts by Employee Report](#)

[Employee Productivity Report](#)

[Red Flag Report](#)

Store Productivity Report

Summary Report

Tender Type Report

Store Productivity Report

The purpose of this section is to showcase the Store Productivity Report, which provides you with each day's store productivity (measured by net sales divided by hours worked) for any date range you specify.

Generating the Store Productivity Report

STEP 1: From your Dashboard view, mouse over the **Reports** tab and click **Other Reports**.

Dashboard

Store: **PTC Concierge Support** | Search | Chat | Settings | Log Out

Alerts

Message	Date
Unrecognized Clock-In Employee from POS	5/16/2017

[View All](#)

Compare

Sales By Day

	Today	Prev Week	Prev Year
Sales	\$46	\$562	\$391
Checks	1	10	6
Average Check	\$45.98	\$56.22	\$65.16

[Previous Day](#)

Sales By Week

	Curr WTD	Prev WTD	Prev Yr WTD
Sales	\$106	\$575	\$456
Checks	5	11	11
Average Check	\$21.29	\$52.24	\$41.44

Current Sales Performance

	May Sales	Target	May 2016 MTD
PTC Concierge Support..	\$1,715	N/A	\$11,480
Silver Gift Shoppe	\$98	N/A	\$2,071
Silver Shopping	\$488	N/A	N/A
Total:	\$2,301	N/A	\$13,551

Monthly Progress

Bar chart showing sales for PTC Concierge Support (blue), Silver Gift Shoppe (yellow), and Silver Shopping (green) from Mar 17 to May 17. PTC Concierge Support sales are significantly higher, reaching \$256.1K in March.

Weather Forecast

PTC Concierge Support, Silver Gift Shoppe

Today (5/16)	Tomorrow (5/17)	Thu (5/18)
91° 63°	91° 66°	88° 66°

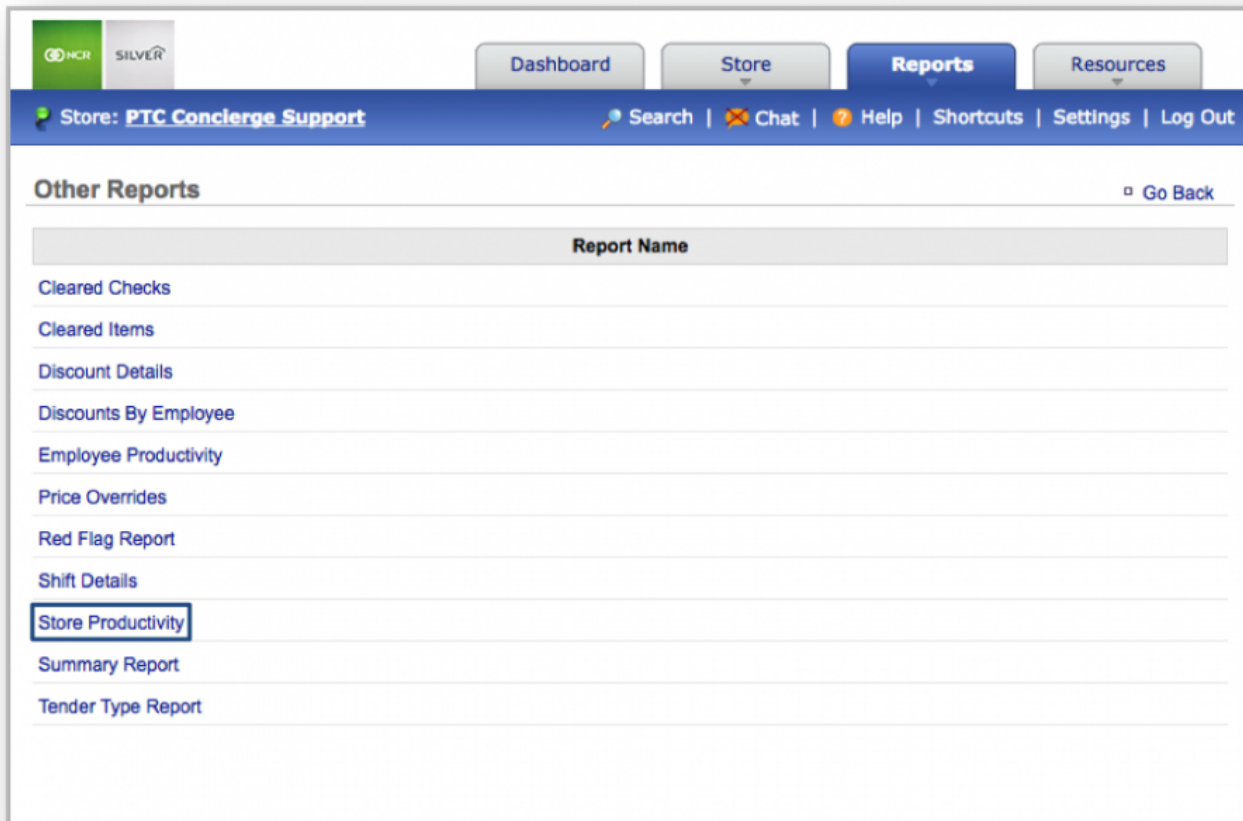
[View Full 5-Day Forecast](#)

Today's Schedule

Sales Forecast

Basis	Year Sales	Week Sales
4 Weeks	\$160,562	\$3,088
8 Weeks	\$117,738	\$2,264
52 Weeks	\$365,650	\$7,032

STEP 2: Within **Other Reports**, click **Store Productivity**.



STEP 3: Select your preferred data range and click ***Run Report***.


The screenshot shows the NCR Silver web interface. At the top, there are navigation tabs: Dashboard, Store, Reports (selected), and Resources. Below the tabs is a blue header bar with the text "Store: PTC Concierge Support" and links for Search, Chat, Help, Shortcuts, Settings, and Log Out. The main content area is titled "Store Productivity" with a "Go Back" link. In the center, there is a form with the following fields:

- Report Name : **Store Productivity**
- Date Range : 4/16/2017 To 5/16/2017
- Run Report button

Store Productivity

Once the report is generated, you will see each day's net sales, hours worked, and the store productivity(net

sales divided by hours worked).

	Dashboard	Store	Reports	Resources
Store: PTC Concierge Support Search Chat Help Shortcuts Settings Log Out				
Store Productivity Go Back More Options				
Date Range: 4/16/2017 - 5/16/2017 [Change]				
Date	Net Sales	Hours Worked	Store Productivity	
4/17/2017	\$2,126.64	0.00	\$0.00	
4/18/2017	\$2,032.62	0.00	\$0.00	
4/19/2017	\$86.99	0.00	\$0.00	
4/20/2017	\$79.50	0.00	\$0.00	
4/21/2017	\$65.08	0.00	\$0.00	
4/24/2017	\$159.41	0.00	\$0.00	
4/25/2017	\$4,718.96	6.72	\$702.57	
4/26/2017	\$313.37	0.00	\$0.00	
4/27/2017	\$0.00	0.00	\$0.00	
4/28/2017	\$116.95	0.00	\$0.00	
5/1/2017	\$127.11	0.00	\$0.00	
5/2/2017	\$383.50	0.00	\$0.00	
5/3/2017	\$373.17	0.00	\$0.00	
5/4/2017	\$108.46	0.00	\$0.00	
5/5/2017	\$29.79	0.00	\$0.00	
5/8/2017	\$12.50	0.00	\$0.00	
5/9/2017	\$497.25	0.00	\$0.00	
5/10/2017	\$16.19	0.00	\$0.00	
5/11/2017	\$75.00	0.00	\$0.00	
5/12/2017	\$35.50	0.00	\$0.00	
5/15/2017	\$10.35	0.00	\$0.00	
5/16/2017	\$79.95	0.00	\$0.00	
Total	\$11,448.29	6.72	\$1,704.46	



Hint: You can change your date range from a generated report by clicking **Change** to the right of **Date Range**.

Did you know? You can export this report by clicking **More Options** at the top right corner of the page and then, **Export**.

Related Topics within Other Reports

[Discount Details Report](#)

[Discounts by Employee Report](#)

[Employee Productivity Report](#)

[Red Flag Report](#)

[Shift Details Report](#)

[Summary Report](#)

[Tender Type Report](#)

Summary Report

The purpose of this section is to showcase the Summary Report, which provides you with a summary of key sales and labor metrics, for any date range you specify.

Generating the Summary Report

STEP 1: From your Dashboard view, mouse over the **Reports** tab and click **Other Reports**.

The screenshot shows the NCR Silver dashboard for the store 'PTC Concierge Support'. The 'Reports' tab is selected, and a dropdown menu is open, highlighting 'Other Reports'. The dashboard includes sections for Alerts, Compare (Sales By Day and Sales By Week), Current Sales Performance, Monthly Progress (with a bar chart), Weather Forecast, Today's Schedule, and Sales Forecast.

Alerts

Message	Date
Unrecognized Clock-In Employee from POS	5/16/2017

[View All](#)

Compare

Sales By Day

	Today	Prev Week	Prev Year
Sales	\$46	\$562	\$391
Checks	1	10	6
Average Check	\$45.98	\$56.22	\$65.16

[Previous Day](#)

Sales By Week

	Curr WTD	Prev WTD	Prev Yr WTD
Sales	\$106	\$575	\$456
Checks	5	11	11
Average Check	\$21.29	\$52.24	\$41.44

Current Sales Performance

	May Sales	Target	May 2016 MTD
PTC Concierge Support..	\$1,715	N/A	\$11,480
Silver Gift Shoppe	\$98	N/A	\$2,071
Silver Shopping	\$488	N/A	N/A
Total:	\$2,301	N/A	\$13,551

Monthly Progress

Bar chart showing sales for PTC Concierge Support (blue), Silver Gift Shoppe (yellow), and Silver Shopping (green) from March 17 to May 17. The Y-axis ranges from \$0 to \$300K. A bar for PTC Concierge Support in March 17 is labeled \$256.1K. Data for April 17 and May 17 is also shown.

Weather Forecast

PTC Concierge Support, Silver Gift Shoppe

Today (5/16)	Tomorrow (5/17)	Thu (5/18)
91° 63°	91° 66°	88° 66°

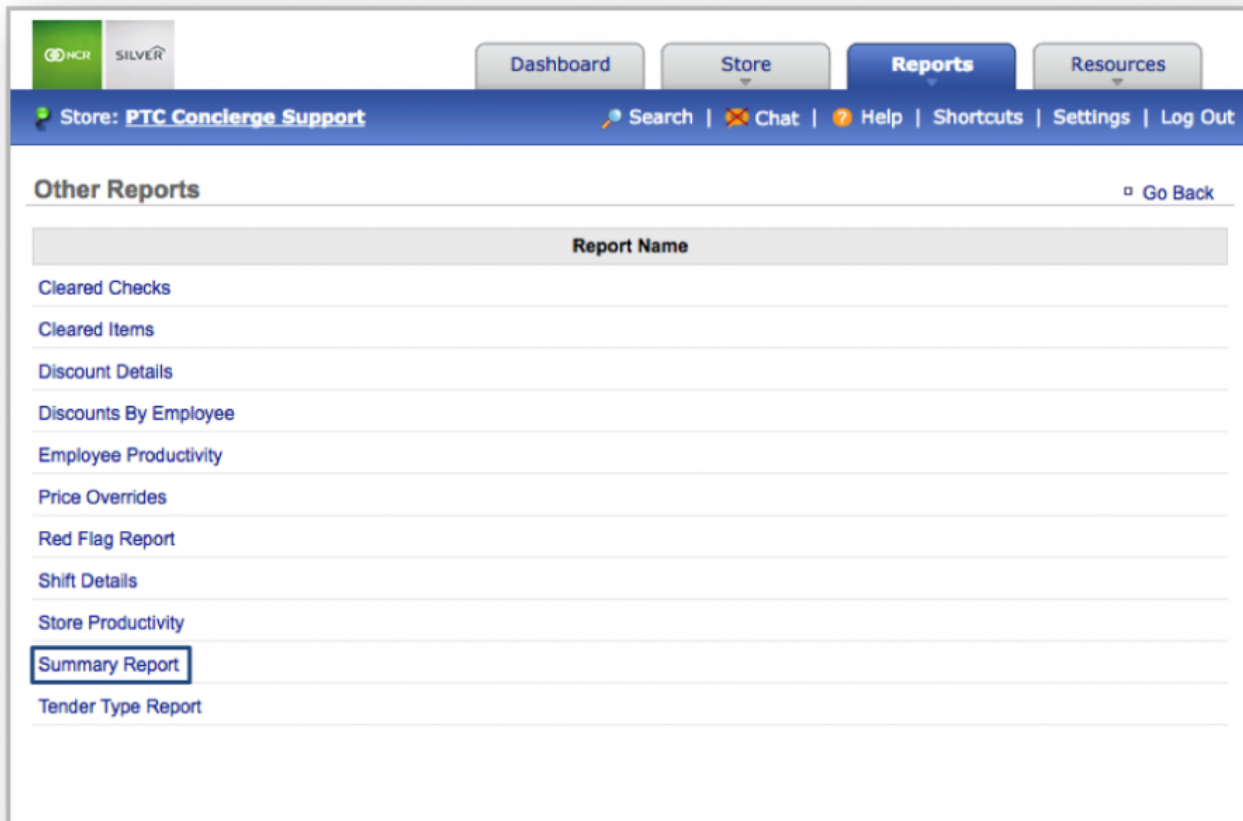
[View Full 5-Day Forecast](#)

Today's Schedule

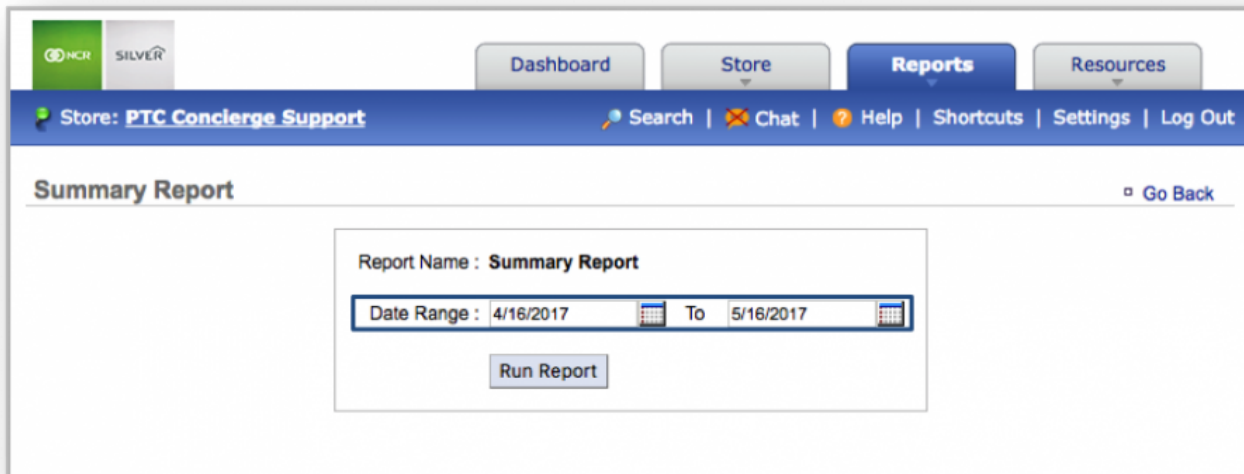
Sales Forecast

Basis	Year Sales	Week Sales
4 Weeks	\$160,562	\$3,088
8 Weeks	\$117,738	\$2,264
52 Weeks	\$365,650	\$7,032

STEP 2: Within **Other Reports**, click **Summary Report**.



STEP 3: Select your preferred data range and click ***Run Report***.



The screenshot shows a web application interface for PTC Concierge Support. At the top, there is a navigation bar with tabs for Dashboard, Store, Reports, and Resources. Below this is a blue header bar containing the store name 'Store: PTC Concierge Support' and links for Search, Chat, Help, Shortcuts, Settings, and Log Out. The main content area is titled 'Summary Report' and includes a 'Go Back' link. A form is displayed with the following fields:

- Report Name : Summary Report
- Date Range : 4/16/2017 To 5/16/2017
- Run Report button

Summary Report

Once the report is generated, each day will be broken down to show several key data points (including but not limited to, Gross Sales, Net Discounts, Total Sales, Net Refunds, Net Sales, Gift Card Sales, Labor

Hours, etc...).

Dashboard

Store

Reports

Resources

Store: PTC Concierge Support

Search

Chat

Help

Shortcuts

Settings

Log Out

Summary Report

Go Back

More Options

Print

Export

Date Range: 4/16/2017 - 5/16/2017

Change

Date	Gross Sales	Net Discounts	Total Sales	Net Refunds	Net Sales	Gift Card Sales	Total Taxes	Total Receipts	Donations	Gift Cards Sold	Hours Worked	Credit Sales
4/17/2017	\$2,140.99	\$7.35	\$2,133.64	\$7.00	\$2,126.64	\$0.00	\$145.52	\$2,272.16	\$0.00	\$0.00	0.00	\$19.71
4/18/2017	\$2,126.30	\$22.75	\$2,103.55	\$70.93	\$2,032.62	\$0.00	\$132.12	\$2,164.74	\$0.00	\$0.00	0.00	\$6.70
4/19/2017	\$87.99	\$1.00	\$86.99	\$0.00	\$86.99	\$0.00	\$5.74	\$92.73	\$0.00	\$0.00	0.00	\$31.42
4/20/2017	\$159.99	\$80.49	\$79.50	\$0.00	\$79.50	\$0.00	\$5.17	\$84.67	\$0.00	\$0.00	0.00	\$0.00
4/21/2017	\$173.48	\$7.40	\$166.08	\$101.00	\$65.08	\$0.00	\$3.82	\$68.90	\$0.00	\$0.00	0.00	\$5.86
4/24/2017	\$181.78	\$18.87	\$162.91	\$3.50	\$159.41	\$0.00	\$10.24	\$169.65	\$0.00	\$0.00	0.00	\$12.25
4/25/2017	\$4,761.44	\$10.50	\$4,750.94	\$31.98	\$4,718.96	\$0.00	\$306.73	\$5,025.69	\$0.00	\$0.00	6.72	\$46.86
4/26/2017	\$469.98	\$156.61	\$313.37	\$0.00	\$313.37	\$0.00	\$20.15	\$333.52	\$0.00	\$0.00	0.00	\$0.00
4/27/2017	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00	\$0.00
4/28/2017	\$130.50	\$13.55	\$116.95	\$0.00	\$116.95	\$0.00	\$7.61	\$124.56	\$0.00	\$0.00	0.00	\$14.86
5/1/2017	\$138.34	\$11.23	\$127.11	\$0.00	\$127.11	\$0.00	\$8.27	\$135.38	\$0.00	\$0.00	0.00	\$0.00
5/2/2017	\$383.50	\$0.00	\$383.50	\$0.00	\$383.50	\$0.00	\$24.93	\$408.43	\$0.00	\$0.00	0.00	\$70.29
5/3/2017	\$373.17	\$0.00	\$373.17	\$0.00	\$373.17	\$0.00	\$24.45	\$397.62	\$0.00	\$0.00	0.00	\$27.04
5/4/2017	\$124.46	\$16.00	\$108.46	\$0.00	\$108.46	\$0.00	\$7.07	\$115.53	\$0.00	\$0.00	0.00	\$20.76
5/5/2017	\$29.79	\$0.00	\$29.79	\$0.00	\$29.79	\$0.00	\$2.09	\$31.88	\$0.00	\$0.00	0.00	\$12.25
5/8/2017	\$12.50	\$0.00	\$12.50	\$0.00	\$12.50	\$0.00	\$0.81	\$13.31	\$0.00	\$0.00	0.00	\$0.00
5/9/2017	\$805.25	\$300.00	\$505.25	\$8.00	\$497.25	\$0.00	\$31.54	\$528.79	\$0.00	\$0.00	0.00	\$0.00



Hint: You can change your date range from a generated report by clicking **Change** to the right of **Date Range**.

Did you know? You can export this report by clicking **More Options** at the top right corner of the page and then, **Export**.

Related Topics within Other Reports

[Discount Details Report](#)

[Discounts by Employee Report](#)

Employee Productivity Report

Red Flag Report

Shift Details Report

Store Productivity Report

Tender Type Report

Tender Type Report

The purpose of this section is to showcase the Tender Type Report, which provides you with a breakdown of tender types for each day's sales, for any date range you specify.

[Generating the Tender Type Report](#)

STEP 1: From your Dashboard view, mouse over the **Reports** tab and click **Other Reports**.

The screenshot shows the NCR Silver dashboard for the store "PTC Concierge Support". The "Reports" tab is selected, and the "Other Reports" option is highlighted in the dropdown menu. The dashboard includes sections for Alerts, Compare (Sales By Day and Sales By Week), Current Sales Performance, Monthly Progress (with a bar chart), Weather Forecast, Today's Schedule, and Sales Forecast.

Alerts

Message	Date
Unrecognized Clock-In Employee from POS	5/16/2017

[View All](#)

Compare

Sales By Day

	Today	Prev Week	Prev Year
Sales	\$46	\$562	\$391
Checks	1	10	6
Average Check	\$45.98	\$56.22	\$65.16

[Previous Day](#)

Sales By Week

	Curr WTD	Prev WTD	Prev Yr WTD
Sales	\$106	\$575	\$456
Checks	5	11	11
Average Check	\$21.29	\$52.24	\$41.44

Current Sales Performance

	May Sales	Target	May 2016 MTD
PTC Concierge Support..	\$1,715	N/A	\$11,480
Silver Gift Shoppe	\$98	N/A	\$2,071
Silver Shopping	\$488	N/A	N/A
Total:	\$2,301	N/A	\$13,551

Monthly Progress

Bar chart showing sales for PTC Concierge Support, Silver Gift Shoppe, and Silver Shopping from March 17 to May 17. The Y-axis ranges from \$0 to \$300K. The X-axis shows the months Mar 17, Apr 17, and May 17. A legend indicates: PTC Concierge Support (blue), Silver Gift Shoppe (yellow), and Silver Shopping (green).

Weather Forecast

PTC Concierge Support, Silver Gift Shoppe

Today (5/16)	Tomorrow (5/17)	Thu (5/18)
91° 63°	91° 66°	88° 66°

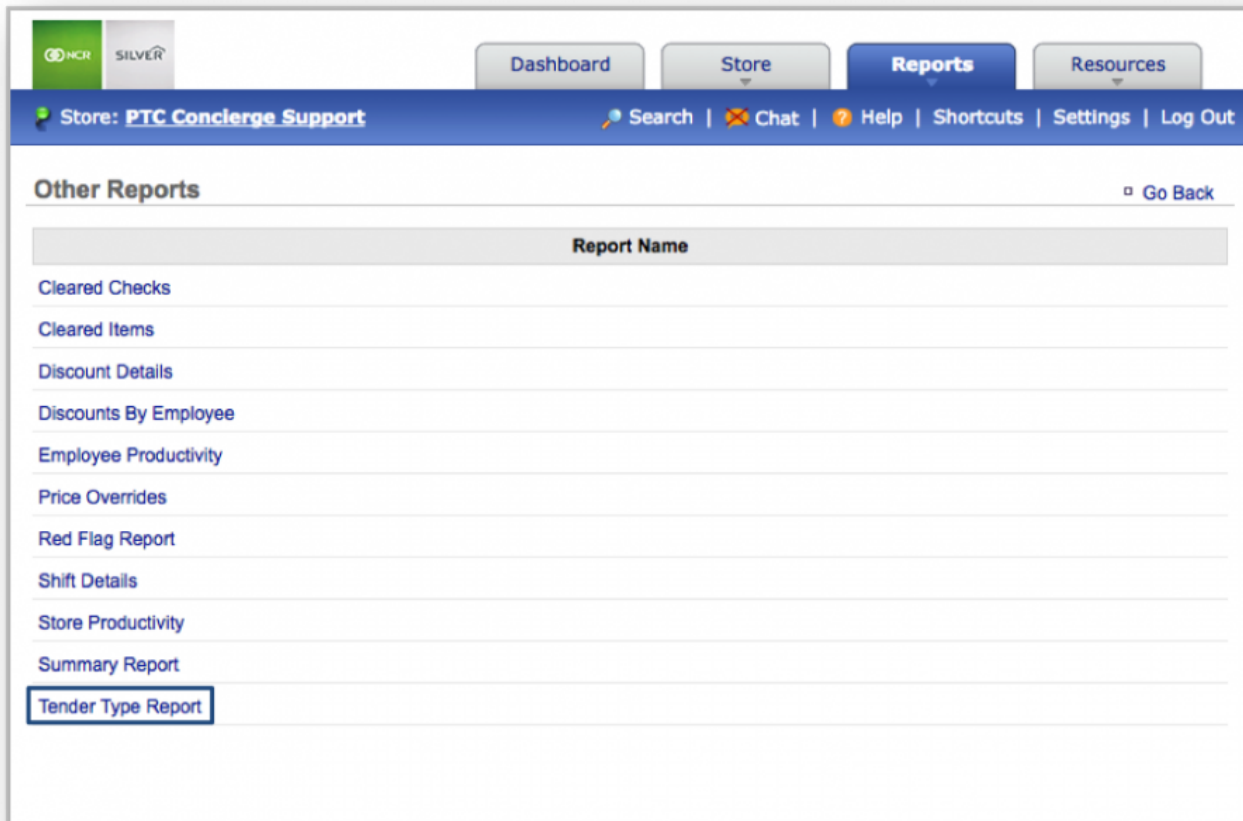
[View Full 5-Day Forecast](#)

Today's Schedule

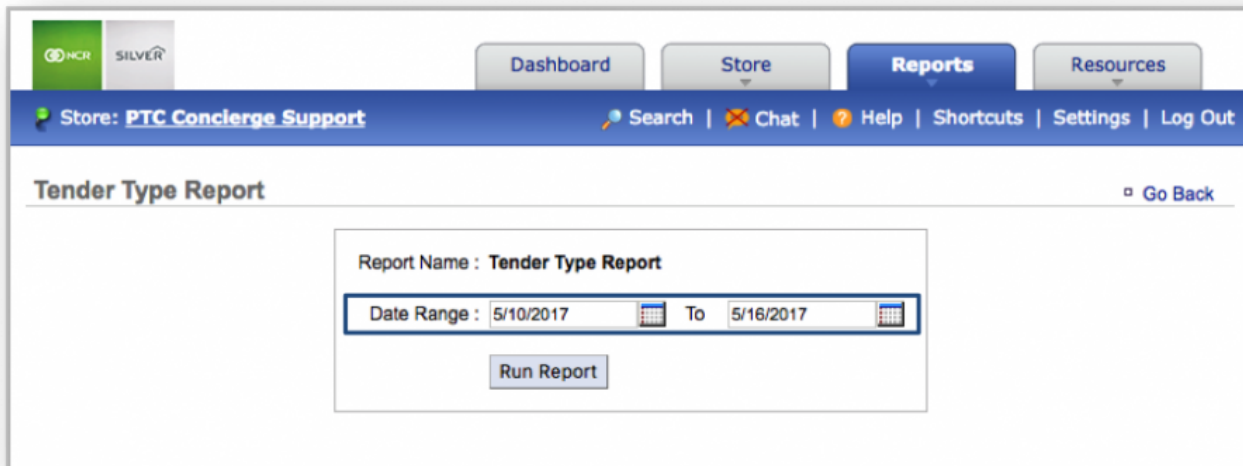
Sales Forecast

Basis	Year Sales	Week Sales
4 Weeks	\$160,562	\$3,088
8 Weeks	\$117,738	\$2,264
52 Weeks	\$365,650	\$7,032

STEP 2: Within **Other Reports**, click **Tender Type Report**.



STEP 3: Select your preferred data range and click ***Run Report***.




The screenshot shows the NCR Silver interface. At the top, there are tabs for Dashboard, Store, Reports, and Resources. Below these is a blue navigation bar with the text "Store: PTC Concierge Support" and links for Search, Chat, Help, Shortcuts, Settings, and Log Out. The main content area is titled "Tender Type Report" with a "Go Back" link. Inside this area, there is a form with the following fields:

- Report Name : **Tender Type Report**
- Date Range : To
-

Tender Type Report

Once the report is generated, each day will be broken down to show tender types for each day, over the

date range you set.



[Dashboard](#)
[Store](#)
[Reports](#)
[Resources](#)

Store: **PTC Concierge Support**
[Search](#) | [Chat](#) | [Help](#) | [Shortcuts](#) | [Settings](#) | [Log Out](#)

Tender Type Report

[Go Back](#)
[More Options](#)

Date Range: 5/10/2017 - 5/16/2017 [\[Change \]](#)
[Export](#)

PTC Concierge Support

Date	Cash	Credit	Check	Debit	Gift Card	Online	Amex	Visa	MC	Discover	Other
5/10/2017	\$17.24	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5/11/2017	\$79.88	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5/12/2017	\$37.84	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5/13/2017	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5/14/2017	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5/15/2017	\$11.02	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5/16/2017	\$177.41	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total	\$323.39	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Silver Gift Shoppe

Date	Cash	Credit	Check	Debit	Gift Card	Online	Amex	Visa	MC	Discover	Other
5/10/2017	\$0.00	\$10.10	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10.10	\$0.00	\$0.00	\$0.00
5/11/2017	\$0.00	\$46.14	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$46.14	\$0.00	\$0.00	\$0.00
5/12/2017	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5/13/2017	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5/14/2017	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5/15/2017	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5/16/2017	\$0.00	\$78.93	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$78.93	\$0.00	\$0.00	\$0.00
Total	\$0.00	\$135.17	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$135.17	\$0.00	\$0.00	\$0.00

Silver Shopping

Date	Cash	Credit	Check	Debit	Gift Card	Online	Amex	Visa	MC	Discover	Other
5/10/2017	\$69.78	\$3.96	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3.96	\$0.00	\$0.00	\$0.00
5/11/2017	\$81.99	\$34.61	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$34.61	\$0.00	\$0.00	\$0.00
5/12/2017	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5/13/2017	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5/14/2017	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5/15/2017	\$56.11	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5/16/2017	\$15.32	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total	\$223.20	\$38.57	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$38.57	\$0.00	\$0.00	\$0.00



Hint: You can change your date range from a generated report by clicking **Change** to the right of **Date Range**.

Did you know? You can export this report by clicking **More Options** at the top right corner of the page and then, **Export**.

Related Topics within Other Reports

[Discount Details Report](#)

[Discounts by Employee Report](#)

[Employee Productivity Report](#)

[Red Flag Report](#)

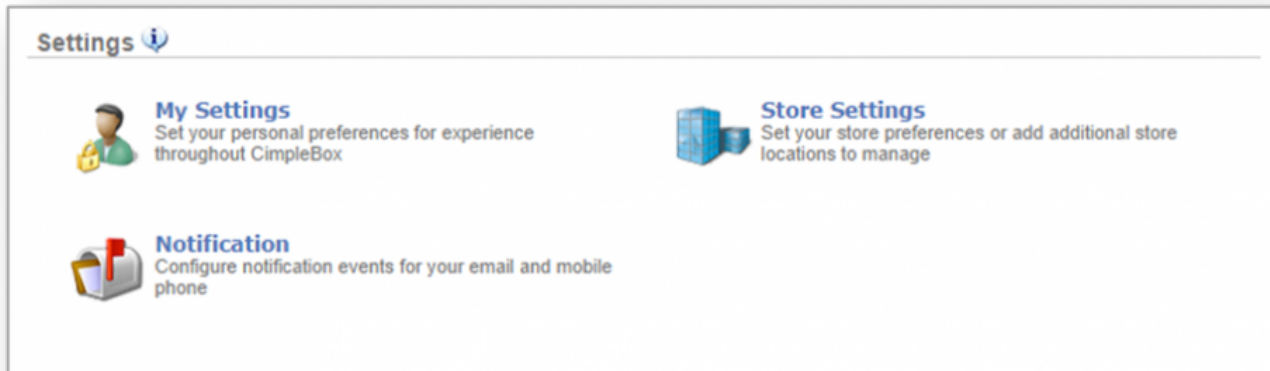
[Shift Details Report](#)

[Store Productivity Report](#)

[Summary Report](#)

Settings

This section will illustrate how to manage your personal, store and notification settings. Click on a topic below for more information.



[Personal Settings](#)

[Change Password](#)

[General Information](#)

[Time Zone](#)

[Store Settings](#)

[General Settings](#)

[Integration](#)

[Notification](#)

[Notification Settings](#)

Personal Settings

The purpose of this section is to illustrate how to change your password, modify general information, and adjust the time zone for your location. Click a topic below for more information.

[Change Password](#)

[General Information](#)

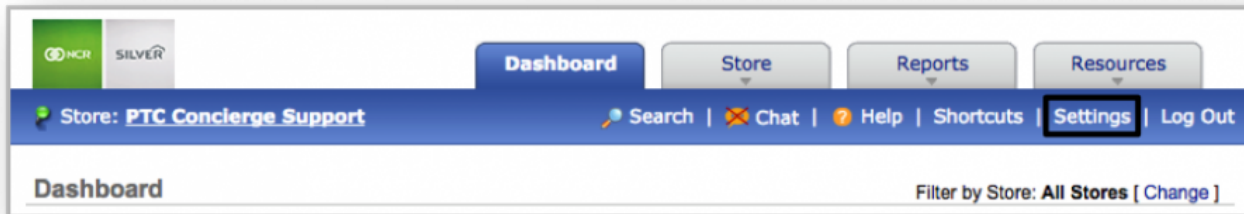
[Time Zone](#)

Change Password

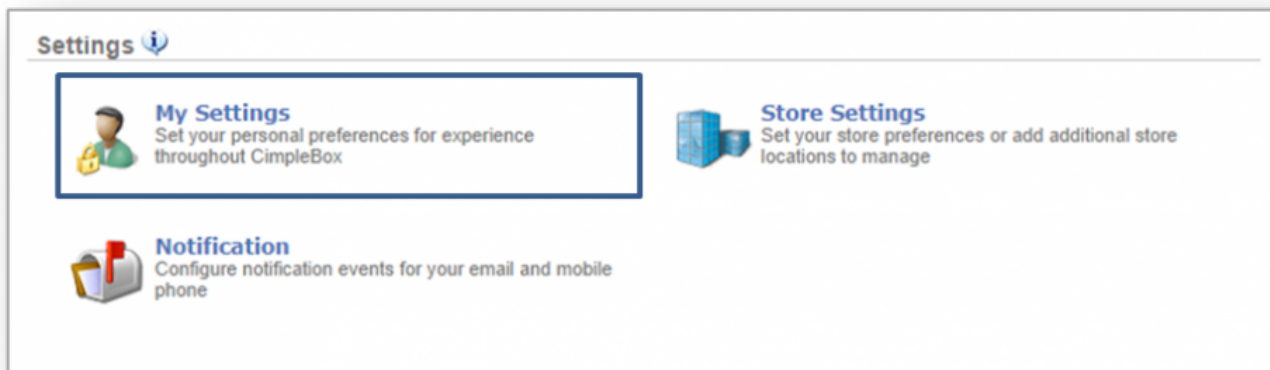
The purpose of this section is to illustrate how to change your CimpleBox password.

Change Password

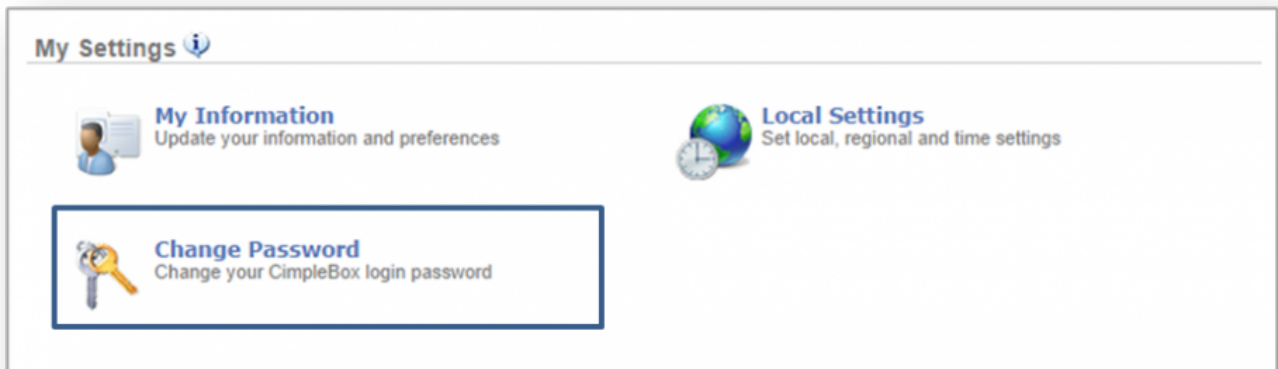
STEP 1: From your Dashboard view, mouse over to, and click, **Settings**.



STEP 2: From the *Settings* screen, click **My Settings**.



STEP 3: From the *My Settings* screen, click **Change Password**.



STEP 4: Enter a current password and a new password. Confirm password and click **Save**.

Related Topics

[General Information](#)

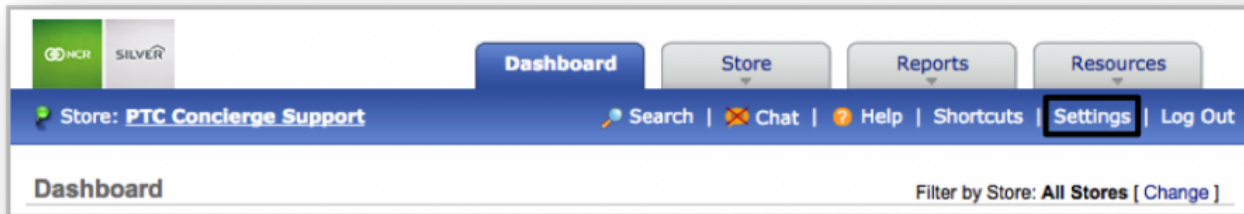
[Time Zone](#)

General Information

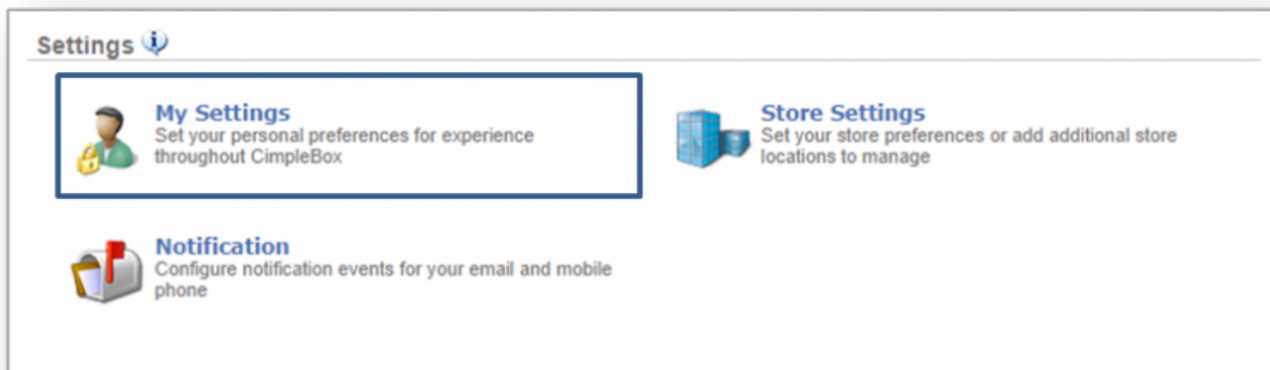
The purpose of this section is to illustrate how to adjust general information.

Adjust General Information

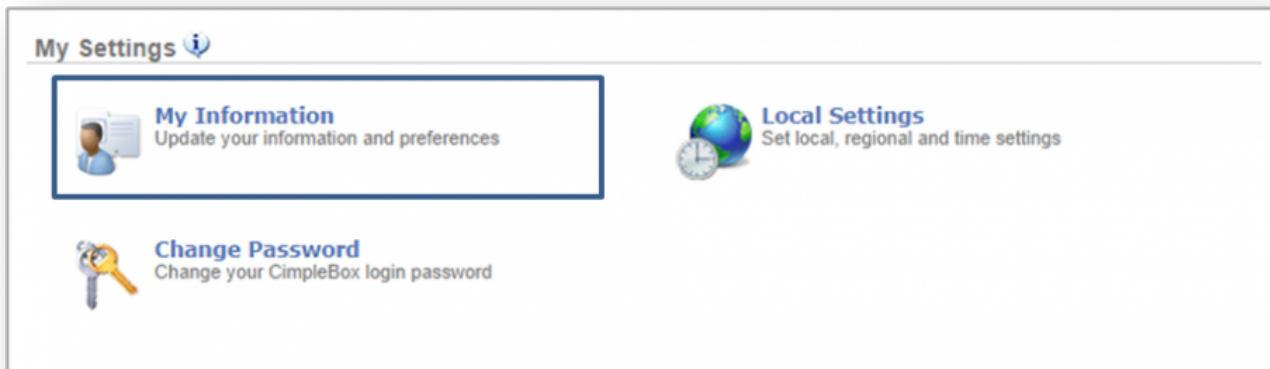
STEP 1: From your Dashboard view, mouse over to, and click, **Settings**.



STEP 2: From the *Settings* screen, click **My Settings**.



STEP 3: From the *My Settings* screen, click ***My Information***.



STEP 4: Adjust desired information, select your default location and click **Save**.

The screenshot shows the 'My Information' form. It has a title 'My Information' at the top. Below it, there are four input fields: 'First Name' with the value 'Samuel', 'Last Name' with the value 'Kim', 'Email Address' with the value 'samk@cimplebox.com', and 'Default Location' with a dropdown menu. The dropdown menu is open, showing three options: 'Imagination Studios' (highlighted in blue), 'Orange Oyster', and 'Surf Turf'. To the right of the form, there are two buttons: 'Save' and 'Cancel'. The 'Save' button is highlighted with a blue border.

Related Topics

[Change Password](#)

[General Information](#)

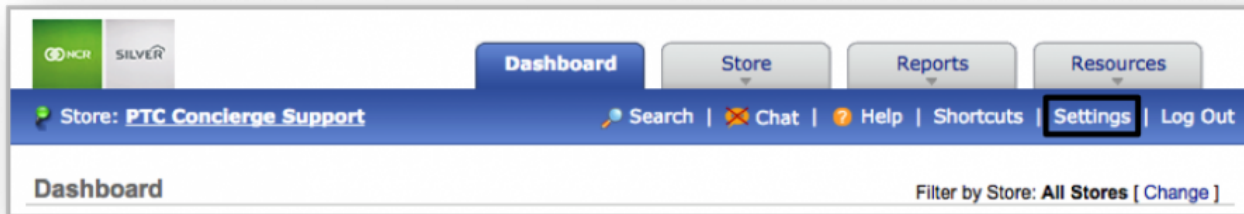
[Time Zone](#)

Time Zone

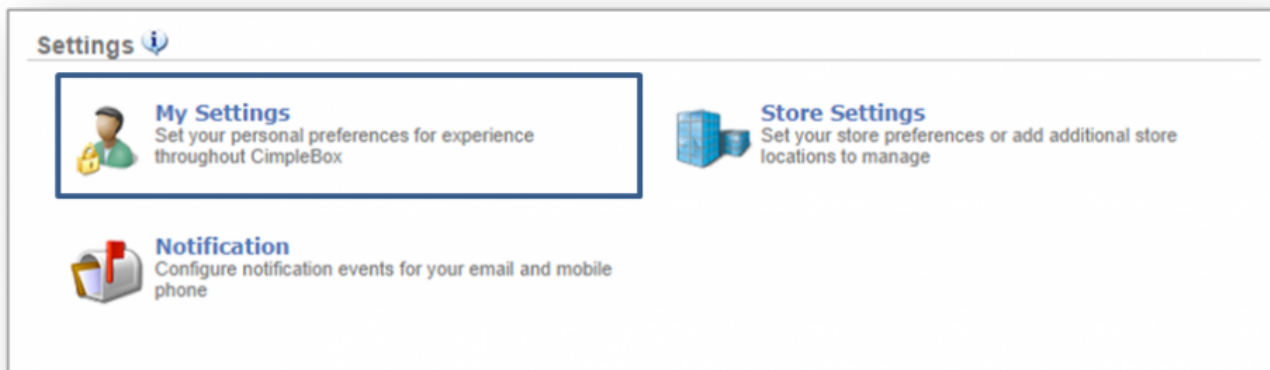
The purpose of this section is to illustrate how to manage time zone information for your location.

Manage Time Zone Information

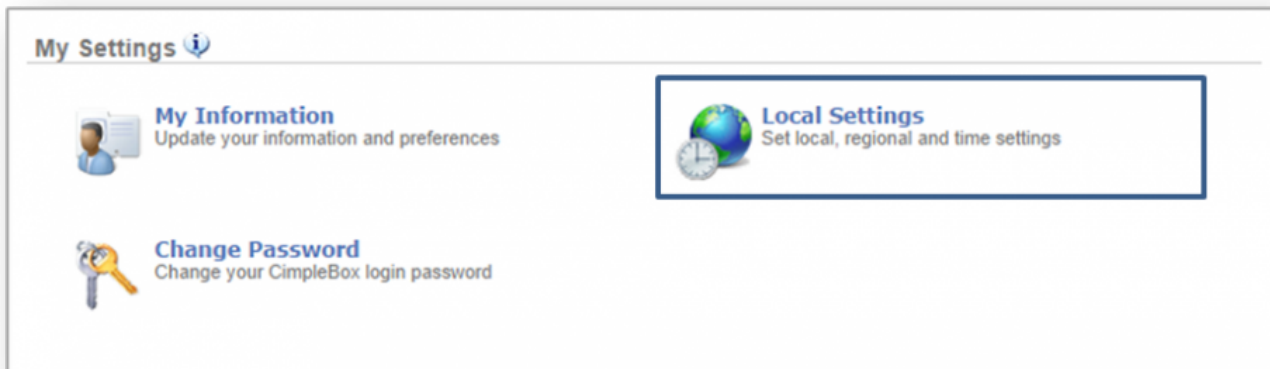
STEP 1: From your Dashboard view, mouse over to, and click, **Settings**.



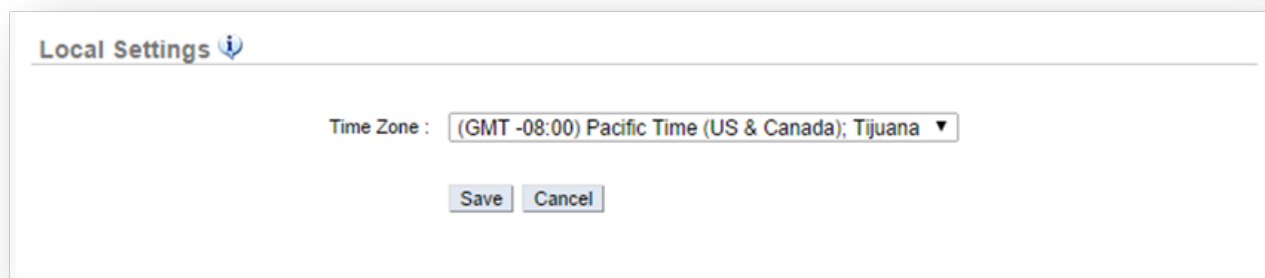
STEP 2: From the *Settings* screen, click **My Settings**.



STEP 3: From the *My Settings* screen, click **Local Settings**.



STEP 4: Select the time zone for your location and click **Save**.



Related Topics

[Change Password](#)

[General Information](#)

Store Settings

The purpose of this section is to illustrate how to change manage general information and the integration of information for your location(s). Click a topic below for more information.

[General Settings](#)

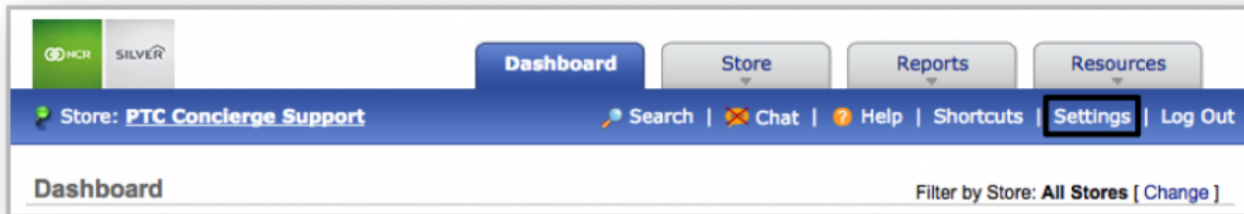
[Integration](#)

General Settings

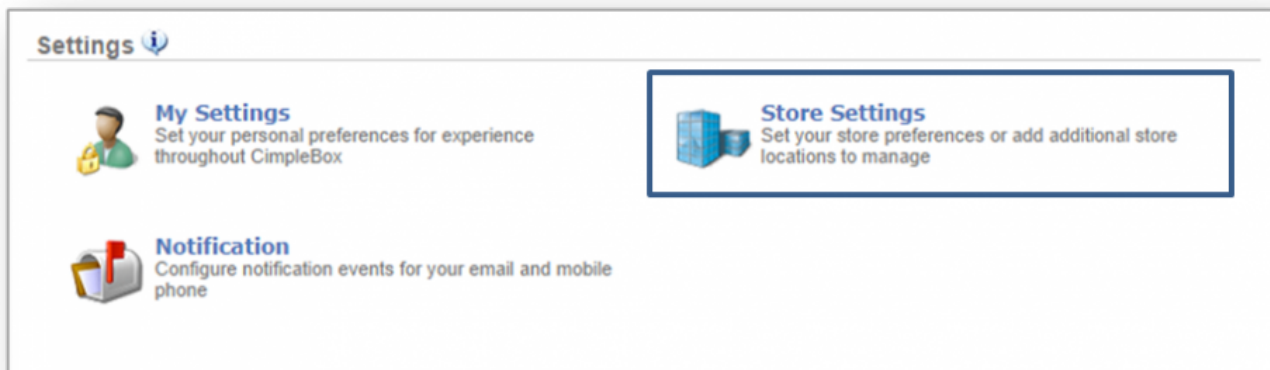
The purpose of this section is to illustrate how to manage general information for your location.

General Information

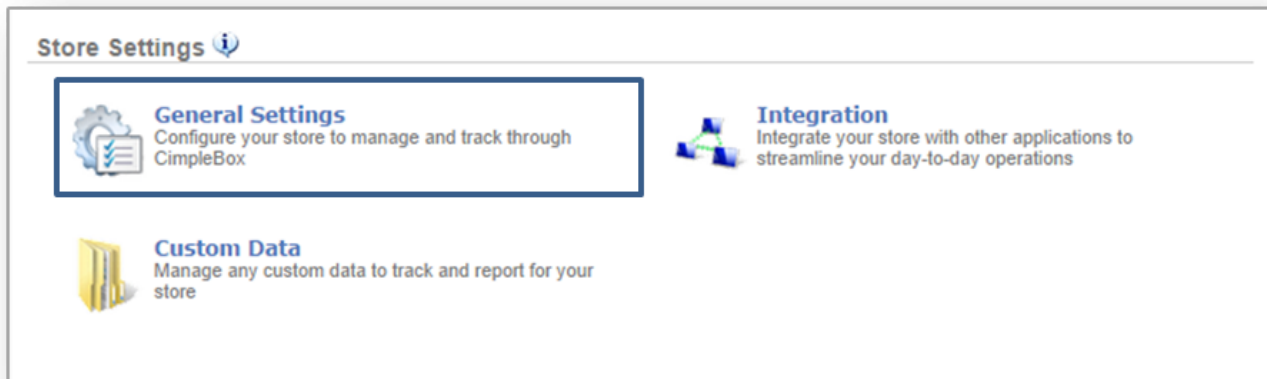
STEP 1: From your Dashboard view, mouse over to, and click, **Settings**.




STEP 2: From the *Settings* screen, click **Store Settings**.




STEP 3: From the *Store Settings* screen, click **General Information**.




Store Settings ⓘ



General Settings
Configure your store to manage and track through CimpleBox



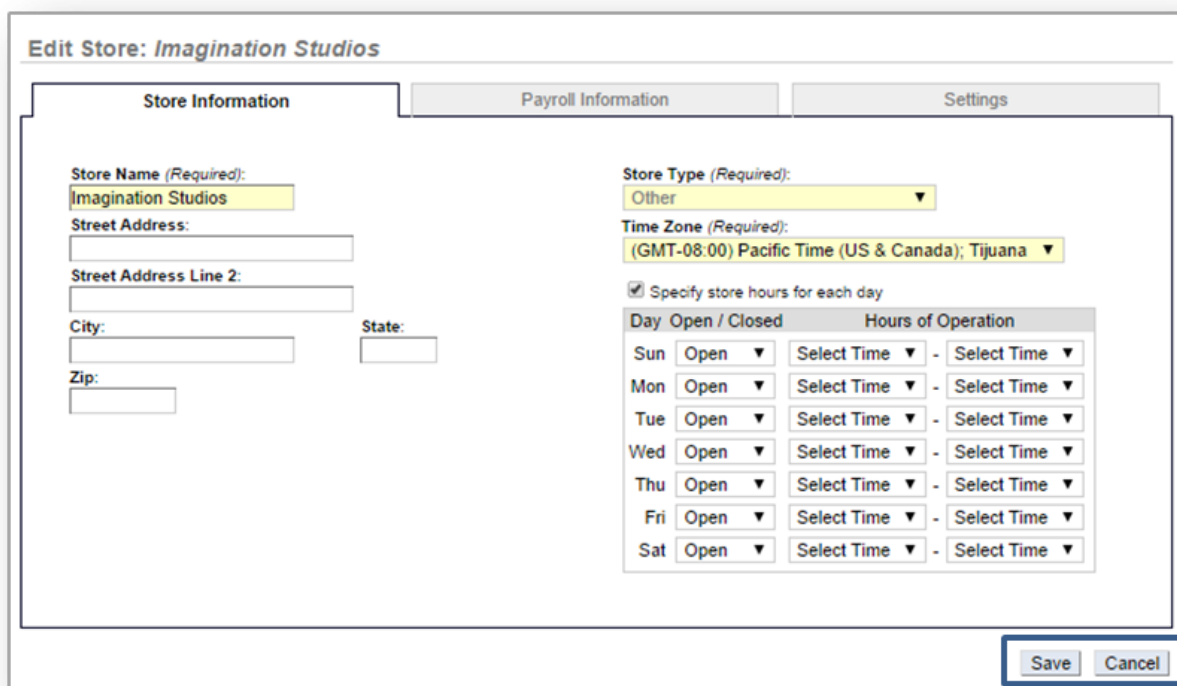
Integration
Integrate your store with other applications to streamline your day-to-day operations



Custom Data
Manage any custom data to track and report for your store

STEP 4: The *Store Information* tab will appear, along with Payroll Information and General Settings.

- **Store Information:** Store Name, Store Type, Time Zone and Hours of Operation are required. Fill in additional information as desired and click **Save** when done.



Edit Store: Imagination Studios

Store Information | Payroll Information | Settings

Store Name (Required):
Imagination Studios

Street Address:
[Text Field]

Street Address Line 2:
[Text Field]

City: [Text Field] **State:** [Text Field]

Zip: [Text Field]

Store Type (Required):
Other ▼

Time Zone (Required):
(GMT-08:00) Pacific Time (US & Canada); Tijuana ▼

☒ Specify store hours for each day

Day	Open / Closed	Hours of Operation	
Sun	Open ▼	Select Time ▼	Select Time ▼
Mon	Open ▼	Select Time ▼	Select Time ▼
Tue	Open ▼	Select Time ▼	Select Time ▼
Wed	Open ▼	Select Time ▼	Select Time ▼
Thu	Open ▼	Select Time ▼	Select Time ▼
Fri	Open ▼	Select Time ▼	Select Time ▼
Sat	Open ▼	Select Time ▼	Select Time ▼

Save **Cancel**

- **Payroll Information:** Select pay frequency and the end of last pay period. Click **Save** when done.

The screenshot shows the 'Edit Store: Imagination Studios' window with the 'Payroll Information' tab selected. The window has three tabs: 'Store Information', 'Payroll Information', and 'Settings'. Under 'Payroll Information', there is a section 'How often do you pay your employees?' with five radio button options: 'Weekly', 'Bi-Weekly' (which is selected), 'Monthly', 'Twice a month (15th and last day of the month)', and 'I will specify later'. Below this is a section 'End of Last Pay Period:' with a date input field and a calendar icon. At the bottom right, there are 'Save' and 'Cancel' buttons.

- **Settings:** Click to display weather forecast. Select start day of operations for your location and week start day for your work schedule. You can also upload product mix data from this screen. Click **Save** when done.

The screenshot shows the 'Edit Store: Imagination Studios' window with the 'Settings' tab selected. The window has three tabs: 'Store Information', 'Payroll Information', and 'Settings'. Under 'Settings', there is a section 'Weather Forecast:' with a checkbox 'Display weather forecast'. Below this is a section 'Days of Operation:' with a 'Week Start' dropdown menu set to 'Sunday'. Below that is a section 'Schedule:' with a 'Week Start' dropdown menu set to 'Monday'. To the right, there is a section 'Upload Data:' with a 'Product Mix' label and a dropdown menu. The dropdown menu is open, showing 'Select a format' at the top, followed by 'Par PixelPoint - Sales by Type Summary (MS Excel)' and 'Par PixelPoint - Sales by Type Detailed (MS Excel)'. At the bottom right, there are 'Save' and 'Cancel' buttons.

Related Topics

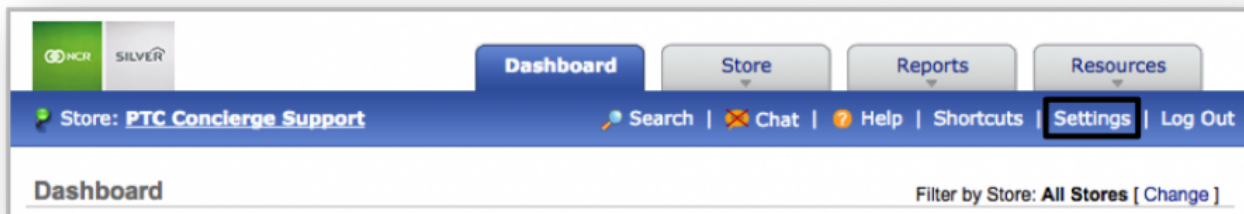
Integration

Integration

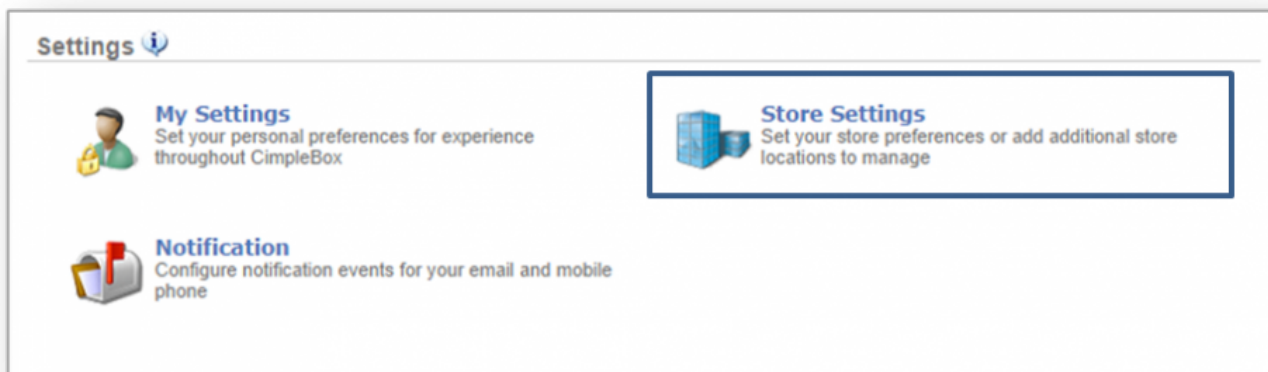
The purpose of this section is to illustrate how to manage POS and Payroll integration of information for your location.

POS Integration

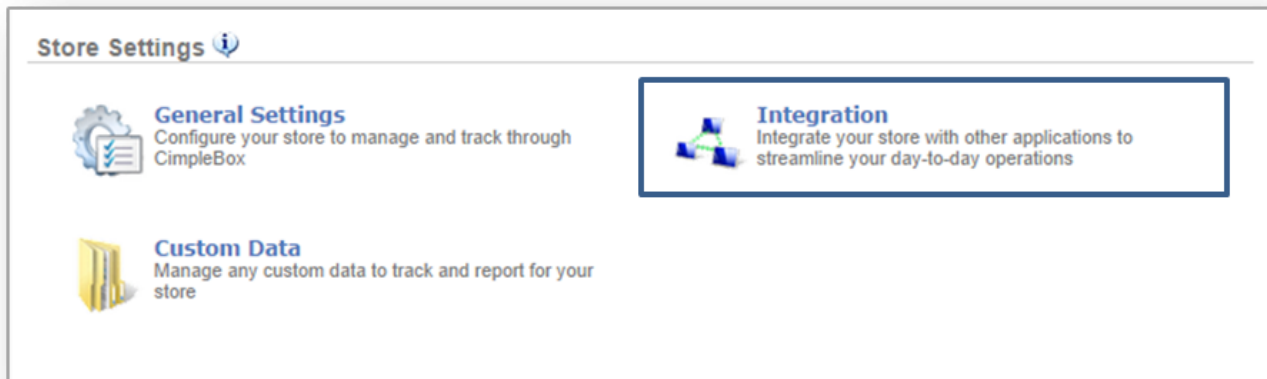
STEP 1: From your Dashboard view, mouse over to, and click, **Settings**.



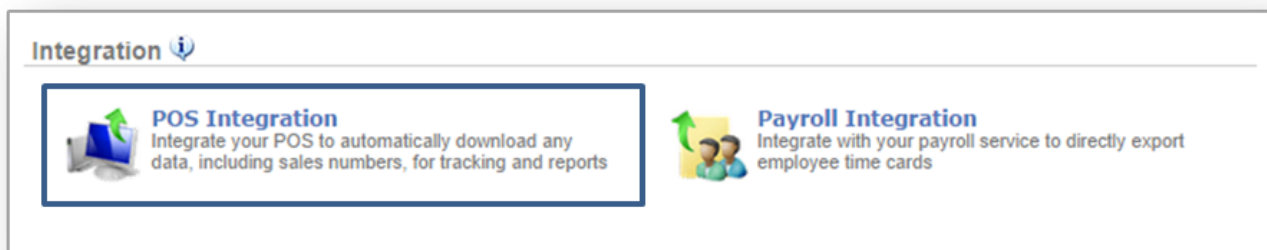
STEP 2: From the *Settings* screen, click **Store Settings**.



STEP 3: From the *Store Settings* screen, click **Integration**.



STEP 4: From the *Integration* screen, select **POS Integration**.



STEP 5: From the *POS Integration* screen, click on the POS name that appears and then on **Configure Users** to enter your employee's POS IDs. Click **Save** when done.

Integration ⓘ

POS

Microsoft Dynamics POS

Edit Integration ⓘ [Go Back](#)

Import

Time Card

Configure Users ⓘ

If your employees use your POS to clock in and out for their shifts, this will download their time cards daily.

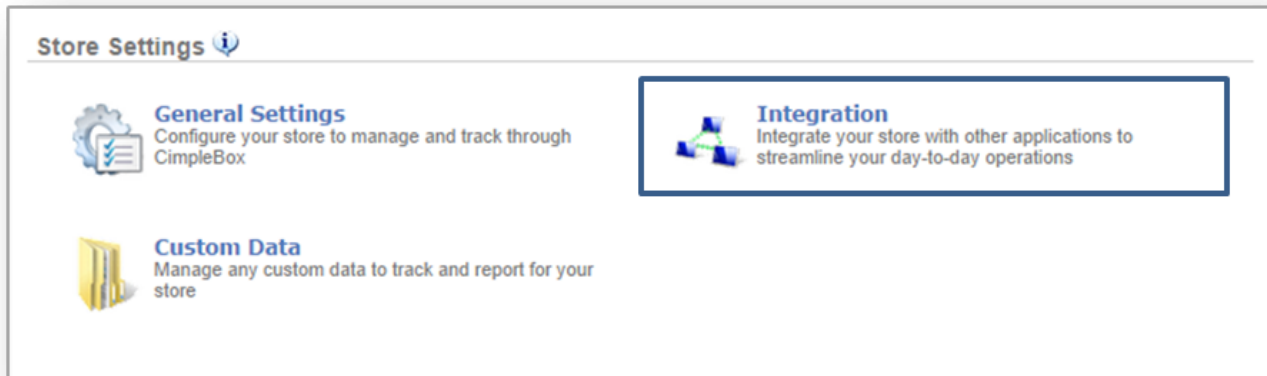
Time Card Integration ⓘ

Name	Cashier ID
Allen, William	462051
Allen, Mike	462049
Carl, William	462043
Allen, William	462053
Allen, William	462004
Allen, William	462041
Allen, William	
Allen, William	462048
Allen, William	462033
Allen, William	
Allen, William	462053
Allen, William	462056
Allen, William	462054
Allen, William	462047
Allen, William	4620016
Allen, William	
Allen, William	462045
Allen, William	462046
Allen, William	462052

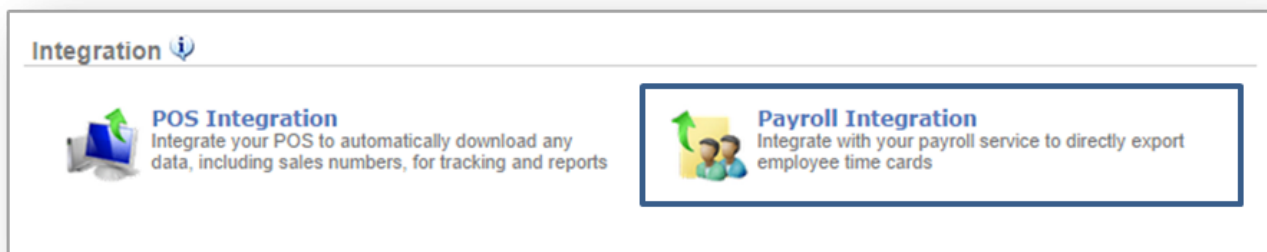
Save **Cancel**

Payroll Integration

STEP 1: From the *Store Settings* screen, click **Integration**.



STEP 2: From the *Integration* screen, select **Payroll Integration**.



STEP 3: From the *Payroll Integration* screen, select your payroll provider and click **Next**. From the screen that follows, enter your employees' payroll ID numbers and click **Save** when done.

The image shows two screenshots of a software interface. The top screenshot is titled "Payroll Integration" and features a dropdown menu for "Payroll Provider" set to "ADP". Below this are "Next >>" and "Cancel" buttons. A blue arrow points from the "Next >>" button to the bottom screenshot. The bottom screenshot is titled "ADP Payroll Integration" and contains an "ADP Company Code" field with the value "sam". It lists employees in two sections: "Employees at : Multiple Stores" and "Employees at : Imagination Studios". Each section has a table with "Name" and "ADP Employee ID" columns. The "Multiple Stores" section lists John Test, Sam King, and Samuel Kim, with the latter having the ID "123". The "Imagination Studios" section lists Amanda Smith, Jeremy Hong, and Julia Ford. At the bottom right of the second screenshot are "Save" and "Cancel" buttons.

Payroll Integration

Payroll Provider : ADP

Next >> Cancel

ADP Payroll Integration

ADP Company Code sam

Employees at : Multiple Stores

Name	ADP Employee ID
John Test	
Sam King	
Samuel Kim	123

Employees at : Imagination Studios

Name	ADP Employee ID
Amanda Smith	
Jeremy Hong	
Julia Ford	

Save Cancel

Related Topics
General Settings

Notification Settings

In this module, you will learn:

- How to set notification preferences within Console

My Settings

The Notification settings platform allows you to set notification preferences for available reports.

To set notification preferences you will need to click **Settings** (within the blue bar at the top of the page) and click **Notification**.

Dashboard

Store: **Demo Store** | Search | Help | Shortcuts | **Settings** | Log Out

Filter by Store: **All Stores** [Change]

Alerts

Message	Date
Unrecognized Clock-In Employee from POS	8/8/2016
Request to Cover Shift Received	8/7/2016
Request to Cover Shift Received	7/20/2016
Unavailability Received	7/19/2016
Message from Employee 4	7/19/2016

[View All](#)

Current

Sales By Day

	Today	Prev Week	Prev Year
Sales	\$0	\$1,139	\$0

Links

Monthly Progress

Month	Sales (\$K)
Jun 16	\$56.7K
Jul 16	\$54.8K
Aug 16	\$10.3K

Store: **Demo Store** | Search | Help | Shortcuts | **Settings** | Log Out

Settings

My Settings
Set your personal preferences for experience throughout CimpleBox

Store Settings
Set your store preferences or add additional store locations to manage

Notification
Configure notification events for your email and mobile phone

To Set Notification Preferences

- Under the **Mobile Text Message** column, check the boxes to the right of each report that you wish to receive notifications for
 - This option will not be available for all reports*
- Under the **Email** column, check the boxes to the right of each report that you wish to receive notifications for
 - This option will not be available for all reports*
- If you want report notifications to be sent to additional recipients, check the boxes to the right of each report under the **Additional Recipients** column

- a. This option will not available for all reports

Notification Message	Mobile Text Message	Email	Additional Recipients	Send Time
Daily Summary Get a store daily summary, including sales numbers and transaction counts	<input type="checkbox"/>	<input type="checkbox"/>	[Edit List]	12 AM ▼
Detailed Daily Summary Receive a copy of your store's Daily Summary Report	<input type="checkbox"/>	<input type="checkbox"/>	[Edit List]	12 AM ▼
Sales Entry Be notified when a sales number is manually entered for your store	<input type="checkbox"/>	<input type="checkbox"/>	[Edit List]	
Unrecognized Time Card User If you have enabled Time Card Import, be notified when one of your POS users is not matched to a CimpleBox user	<input type="checkbox"/>	<input type="checkbox"/>		12 AM ▼
Survey Receive a notification when a Survey is submitted for your store	<input type="checkbox"/>	<input type="checkbox"/>	[Edit List]	
Review Receive a notification when a Review is submitted for your store	<input type="checkbox"/>	<input type="checkbox"/>	[Edit List]	
Inventory Par Level Report Receive a report listing inventory items that are above or below your par levels	<input type="checkbox"/>	<input type="checkbox"/>	[Edit List]	12 AM ▼

Send message to: [\(Click here to change\)](#) [\(Click here to change\)](#)

[Save](#) [Cancel](#)

- b. You may edit the recipient list at any time by clicking **Edit List**

Notification Settings

Notification Message	Mobile Text Message	Email	Additional Recipients	Send Time
Daily Summary Get a store daily summary, including sales numbers and transaction counts	<input type="checkbox"/>	<input checked="" type="checkbox"/>	[Edit List]	12 AM ▼
Detailed Daily Summary Receive a copy of your store's Daily Summary Report	<input type="checkbox"/>	<input type="checkbox"/>	[Edit List]	12 AM ▼
Sales Entry Be notified when a sales number is manually entered for your store	<input type="checkbox"/>	<input type="checkbox"/>	[Edit List]	
Unrecognized Time Card User If you have enabled Time Card Import, be notified when one of your POS users is not matched to a CimpleBox user	<input type="checkbox"/>	<input type="checkbox"/>		12 AM ▼

Additional Email Recipients

Select a Notification Type
Daily Summary ▼

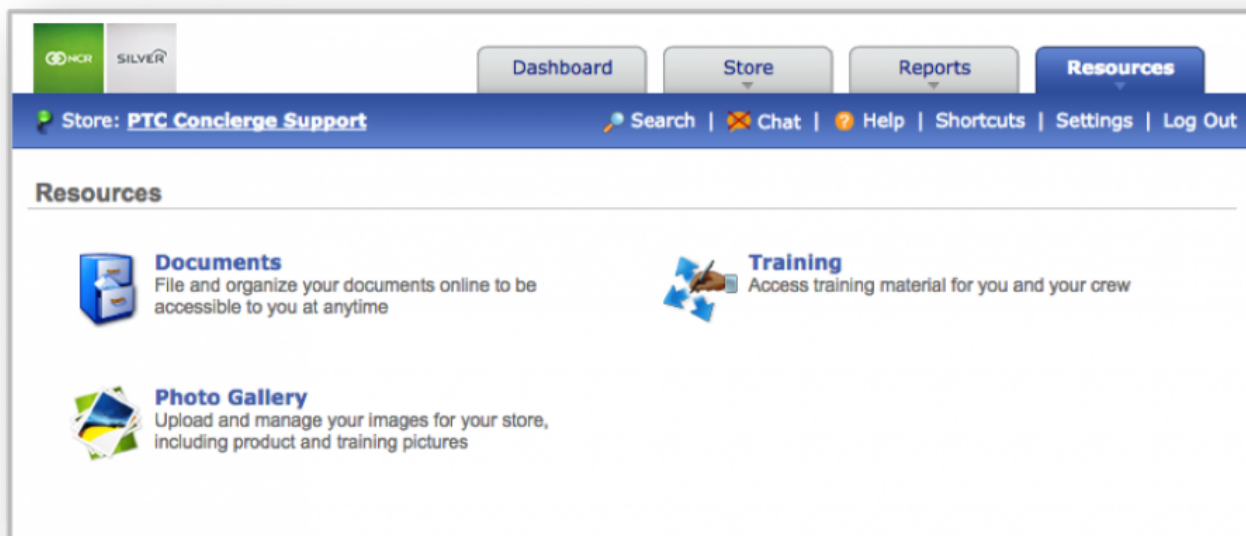
[Add Recipient](#)

4. Select delivery times by checking the dropdown arrow to the of each report under the **Send Time** column
 - a. This option will not available for all reports
5. Click **Save**

- [Click here to see the full details](#)

Resources

This section will illustrate how to manage available resources (e.g. documents, training videos and certification tests and photos). Click on a topic below for more information.



[Resources](#)

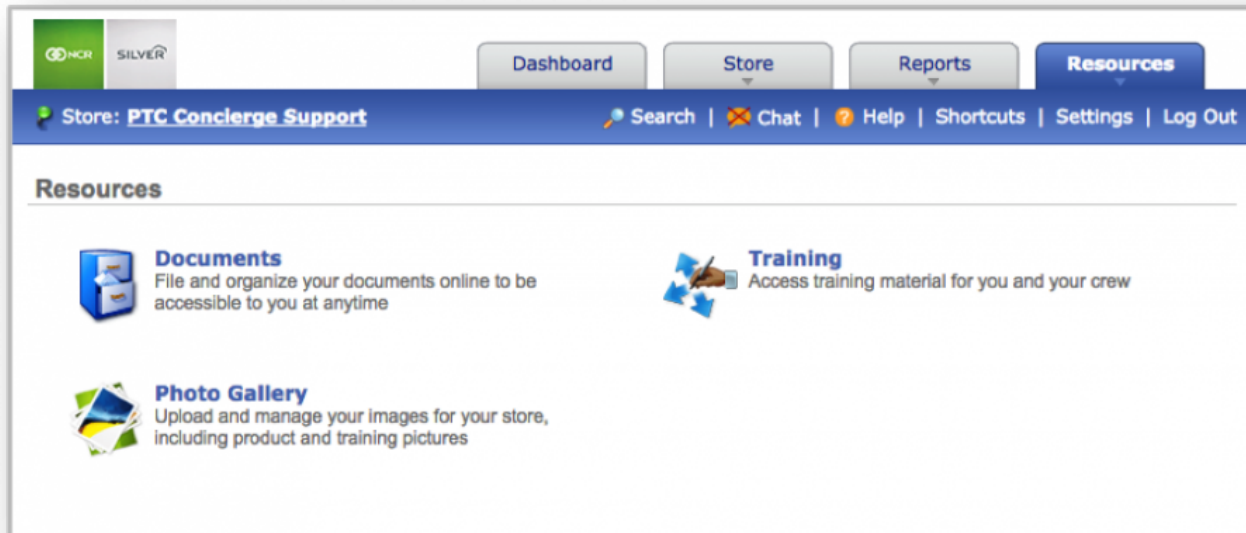
[Documents](#)

[Videos & Training](#)

[Photo Gallery](#)

Documents

The purpose of this section is to illustrate how to manage the document storage feature on CimpleBox. This includes personal documents, documents shared with you by others, and corporate resources.



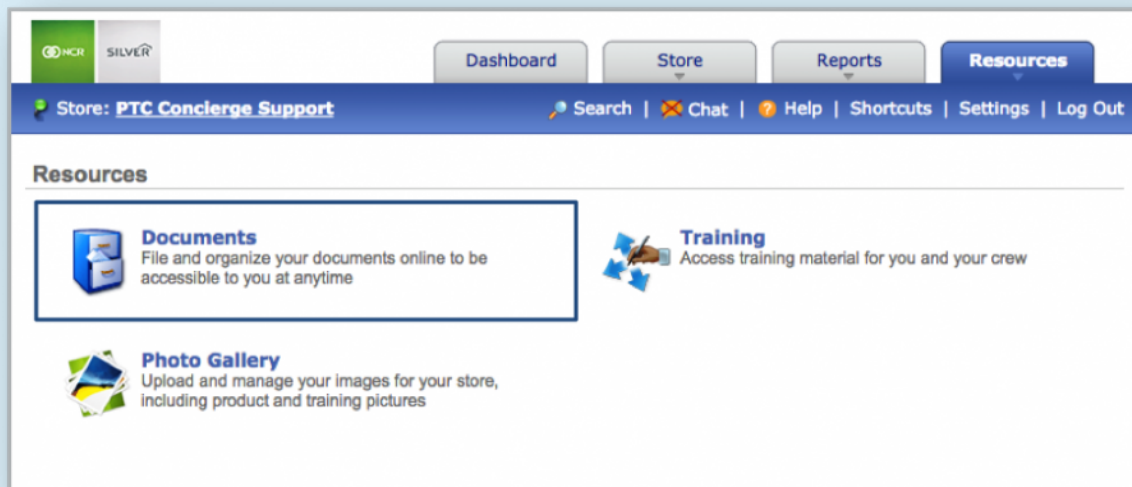
My Documents

STEP 1: From your Dashboard view, mouse over the **Resources** tab and click **Documents**.

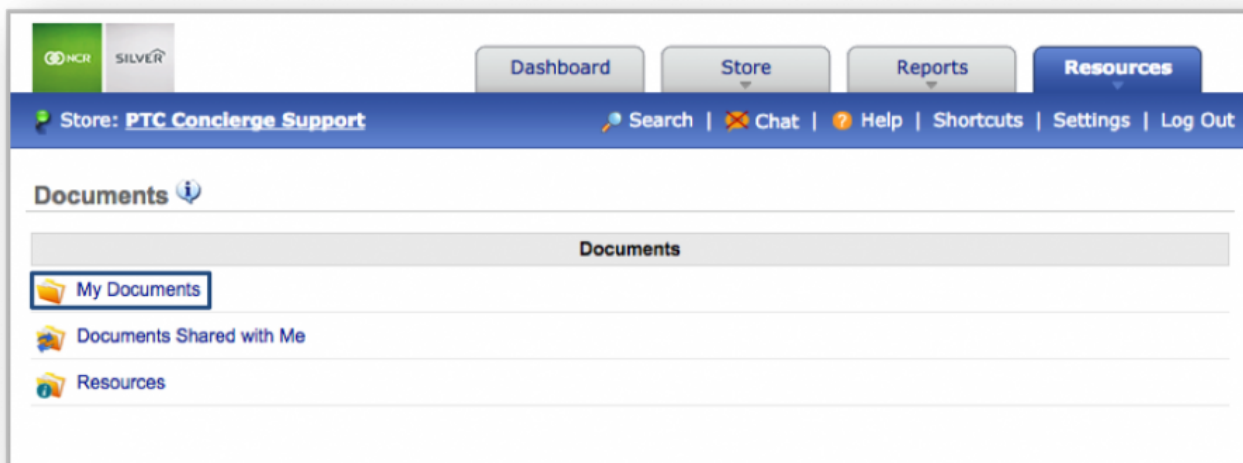
The screenshot shows the NCR Silver dashboard for the store "PTC Concierge Support". The top navigation bar includes "Dashboard", "Store", "Reports", and "Resources". The "Resources" dropdown menu is open, showing "Documents", "Training", and "Photo Gallery". The main dashboard area is divided into several sections:

- Alerts:** A message about an unrecognized clock-in employee from POS on 5/16/2017.
- Compare:**
 - Sales By Day:** A table comparing today's sales (\$253), previous week (\$562), and previous year (\$391).
 - Sales By Week:** A table comparing current week (\$313), previous week (\$575), and previous year (\$456).
- Current Sales Performance:** A table showing May sales (\$1,749), target (N/A), and May 2016 MTD (\$11,480).
- Monthly Progress:** A bar chart showing sales for March, April, and May 2017, comparing PTC Concierge Support, Silver Gift Shoppe, and Silver Shopping.
- Weather Forecast:** A section showing the weather forecast for PTC Concierge Support, Silver Gift Shoppe, and Silver Shopping for the next three days.
- Today's Schedule:** A section for the daily schedule.
- Sales Forecast:** A section showing the sales forecast for the next 4 weeks, including year sales (\$160,562) and week sales (\$3,088).

* **Hint:** You can also access *Documents* by clicking on the **Reports** tab and then on **Documents**.

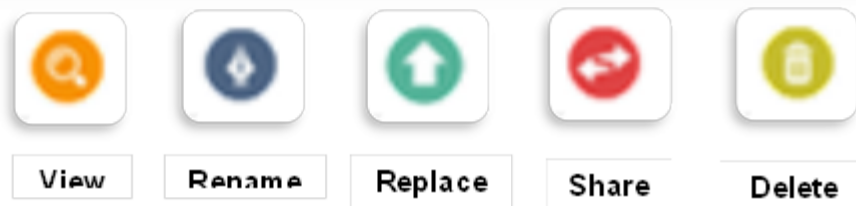
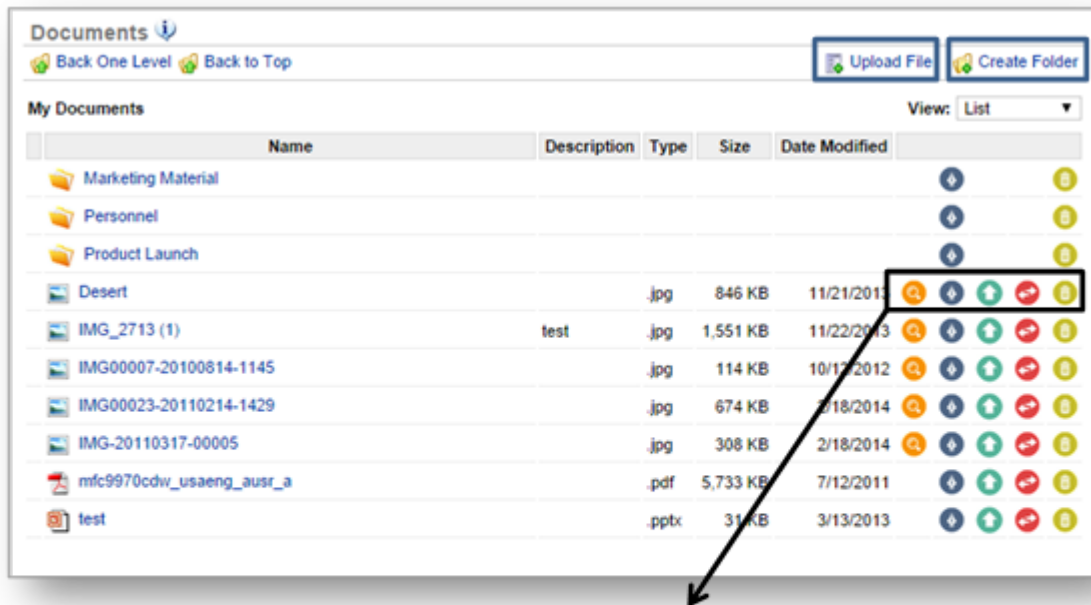


STEP 2: From the *Documents* screen, click **My Documents**.



STEP 3: The *My Documents* screen will appear. My Documents are those documents that you upload and manage. You can choose to share documents or folders with others and there is no limit to the number of folders or documents you can store!

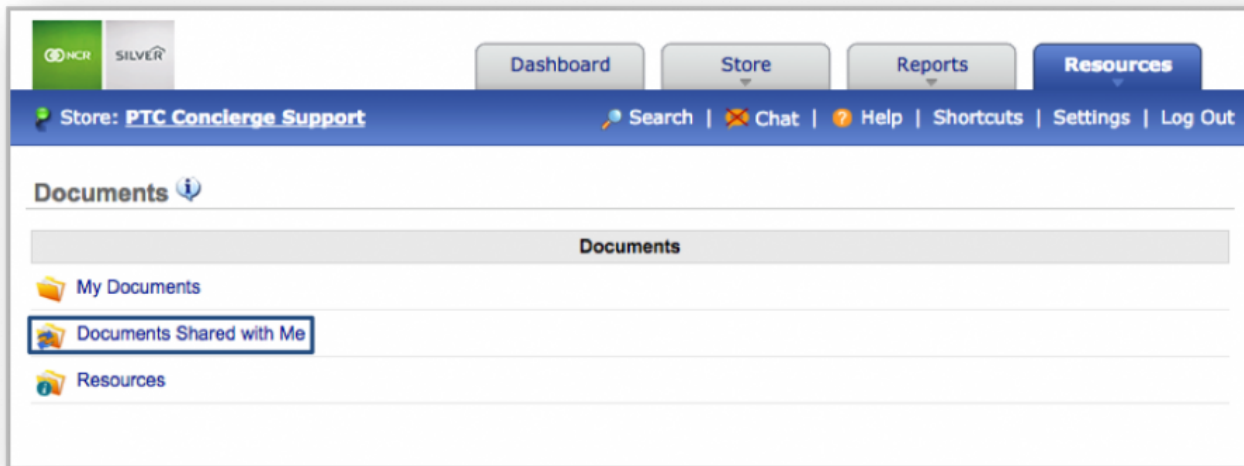
- Click **Upload File** at the top right corner of the page to add a new file.
- Click **Create Folder** at the top right corner of the page to create a new folder.



✿ **Note:** Files that have already been uploaded can't be "moved" to another folder. The folder must be opened and the file must be uploaded to that folder.

Documents Shared with Me

STEP 1: From the *Documents* screen, click **Documents Shared with Me**.

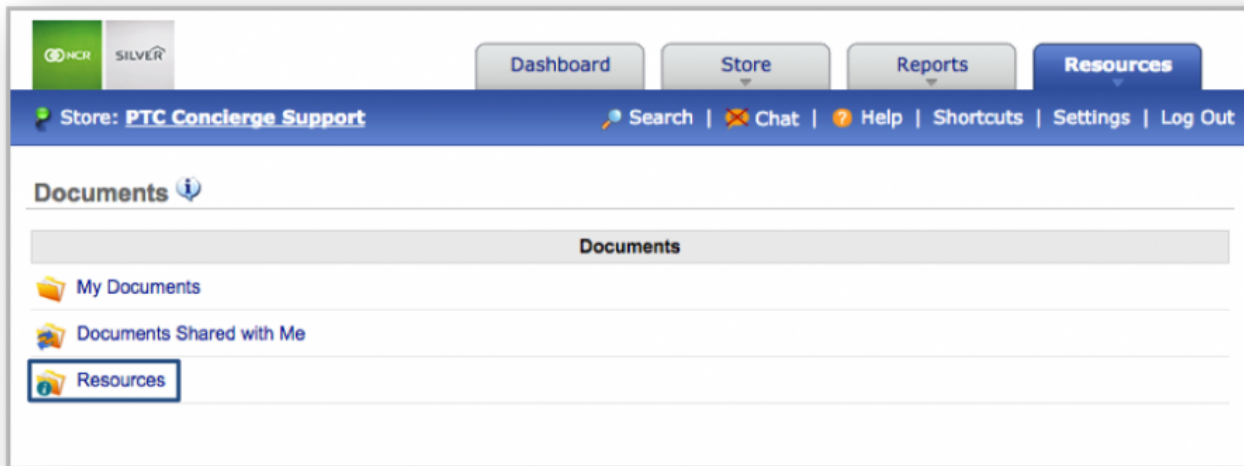


STEP 2: Any document or folder that has been shared with you by others will appear on your screen. Most recent files will appear at the top of the list.

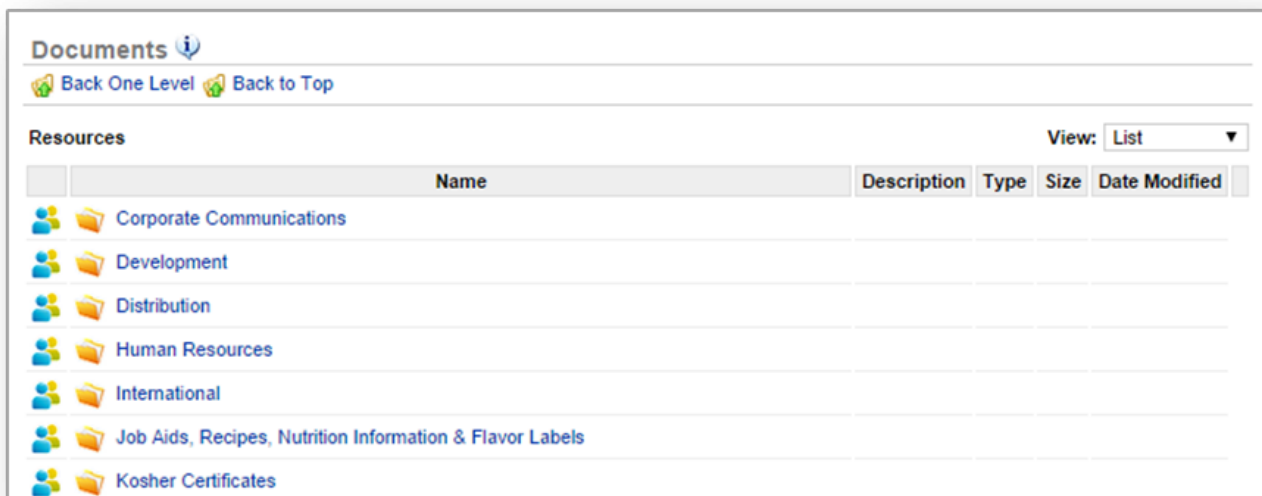
	Name	Description	Type	Size	Date Modified	Shared By
	11-28-2011_PTC Conclerge Message_11-28-2011		pdf	960 KB	11/28/2011	Nicole Anderson
	11-28-2011_PTC Conclerge Message_11-28-2011		pdf	154 KB	11/28/2011	Nicole Anderson
	11-28-2011_PTC Conclerge Message_11-28-2011		pdf	515 KB	11/28/2011	Nicole Anderson
	11-22-2011_PTC Conclerge Message_11-22-2011		pdf	65 KB	11/22/2011	Nicole Anderson
	11-22-2011_PTC Conclerge Message_11-22-2011		pdf	62 KB	11/22/2011	Nicole Anderson

Resources

STEP 1: From the *Documents* screen, click **Resources**.



STEP 2: Any document or folder that has been uploaded to this folder will appear on your screen.



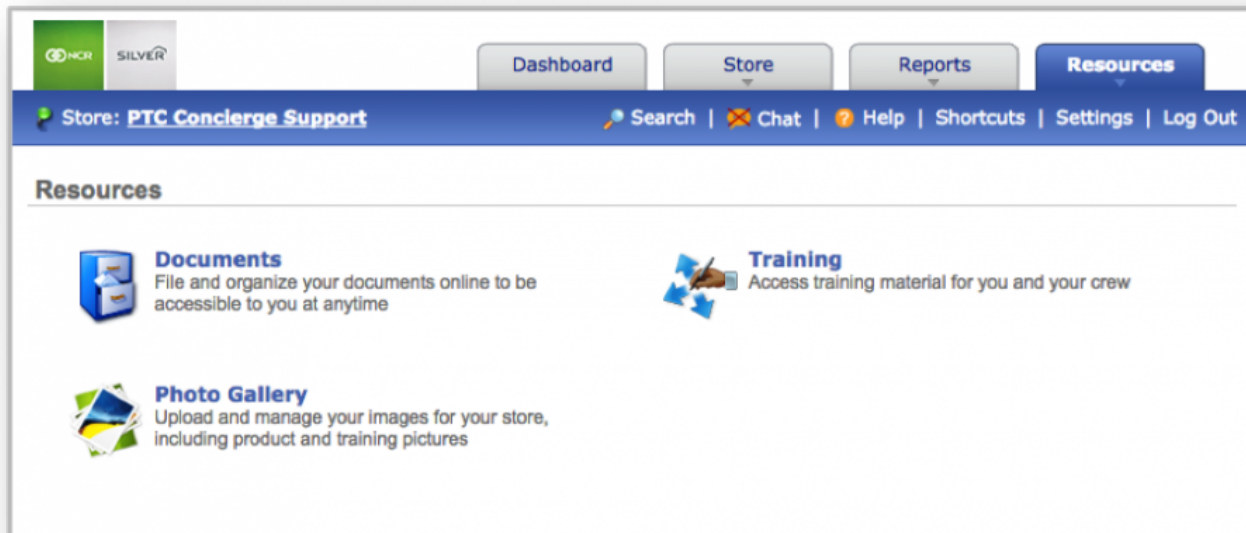
Related Topics

[Videos & Training](#)

[Photo Gallery](#)

Videos & Training

The purpose of this section is to illustrate how to access training videos and certification tests on CimpleBox.



Videos & Training

STEP 1: From your Dashboard view, mouse over the **Resources** tab and click **Training**.

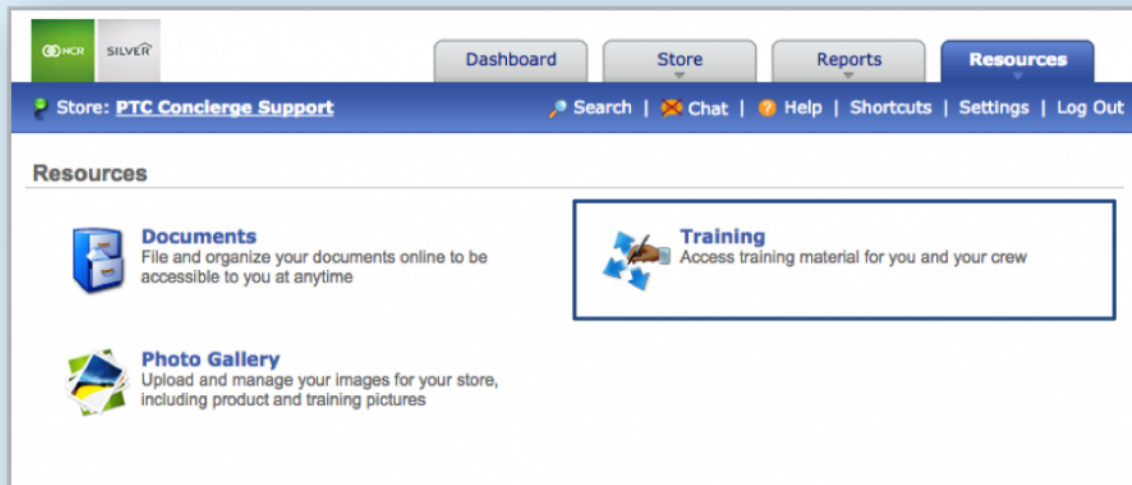
The screenshot displays the NCR Silver Dashboard for the store "PTC Concierge Support". The top navigation bar includes tabs for Dashboard, Store, Reports, and Resources. The Resources dropdown menu is open, showing options for Documents, Training, and Photo Gallery. The main dashboard area is divided into several sections:

- Alerts:** A message about an unrecognized clock-in employee from POS on 5/16/2017, with a "View All" link.
- Compare:** Two tables comparing sales metrics (Sales, Checks, Average Check) for Today, Prev Week, and Prev Year. The first table shows daily sales of \$253, 10 checks, and an average check of \$25.27. The second table shows weekly sales of \$313, 14 checks, and an average check of \$22.36.
- Monthly Progress:** A bar chart showing sales for March, April, and May 2017. The chart compares PTC Concierge Support (blue), Silver Gift Shoppe (orange), and Silver Shopping (green). PTC Concierge Support has the highest sales, reaching \$256.1K in March.
- Weather Forecast:** A section for PTC Concierge Support and Silver Gift Shoppe showing the weather for Today (5/16), Tomorrow (5/17), and Thursday (5/18). Today's forecast is 91°F high and 63°F low. Tomorrow's forecast is 91°F high and 66°F low. Thursday's forecast is 88°F high and 66°F low.
- Today's Schedule:** A section for the current day's schedule.
- Sales Forecast:** A table showing the basis for sales forecasts, including Year Sales and Week Sales for the next 4 weeks.

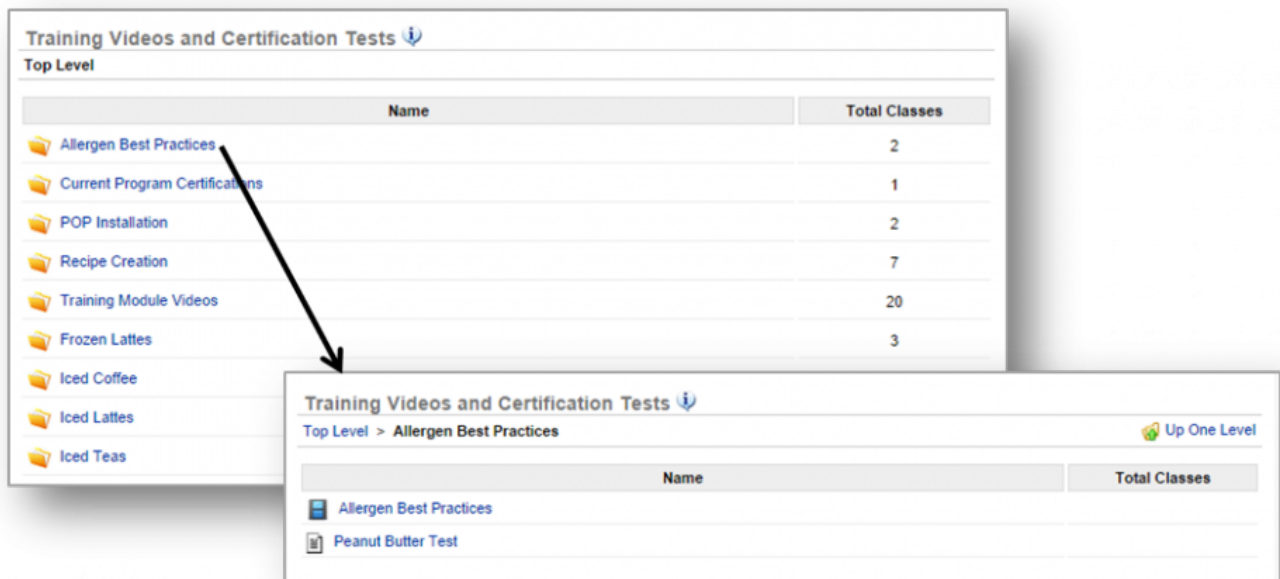
Current Sales Performance Table:

	May Sales	Target	May 2016 MTD
PTC Concierge Suppor..	\$1,749	N/A	\$11,480
Silver Gift Shoppe	\$170	N/A	\$2,071

* **Hint:** You can also access *Training* by clicking on the **Resources** tab and then on **Training**.



STEP 2: From here, click on the course you wish to access. The course folder will contain any applicable videos and/or certification tests. Click on the video or test you wish to access.



Related Topics

Documents

Photo Gallery

Photo Gallery

The purpose of this section is to illustrate how to access your photo gallery.

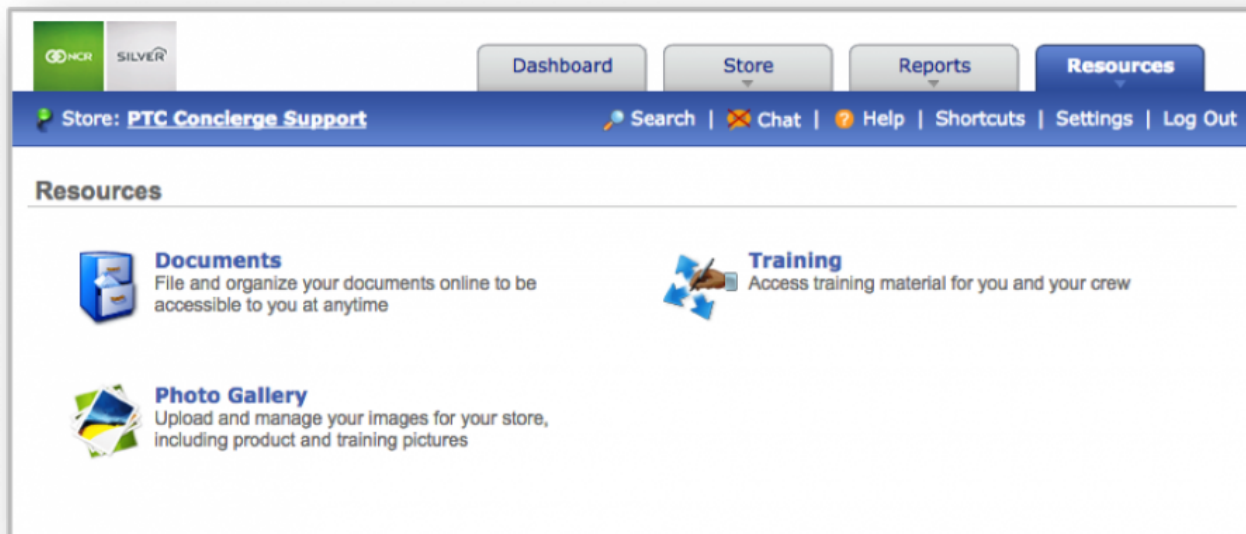


Photo Gallery

STEP 1: From your Dashboard view, mouse over the **Resources** tab and click **Photo Gallery**.

The screenshot shows the NCR Silver dashboard interface. At the top, there are tabs for **Dashboard**, **Store**, **Reports**, and **Resources**. The **Resources** tab is highlighted, and a dropdown menu is open, showing options: **Documents**, **Training**, and **Photo Gallery**. The **Photo Gallery** option is selected and highlighted with a blue border.

The dashboard content includes:

- Alerts:** A message "Unrecognized Clock-In Employee from POS" dated 5/16/2017, with a "View All" link.
- Compare:**
 - Sales By Day:** A table comparing Today, Prev Week, and Prev Year sales.
 - Sales By Week:** A table comparing Current Week To Date (WTD), Previous Week To Date (WTD), and Previous Year WTD sales.
- Current Sales Performance:** A table showing May Sales, Target, and May 2016 MTD for PTC Concierge Support and Silver Gift Shoppe.
- Monthly Progress:** A bar chart showing sales for PTC Concierge Support, Silver Gift Shoppe, and Silver Shopping from March to May 2017.
- Weather Forecast:** A section for PTC Concierge Support and Silver Gift Shoppe showing today's and tomorrow's weather.
- Today's Schedule:** A section for the current day's schedule.
- Sales Forecast:** A table showing the basis, year sales, and week sales for the next 4 weeks.

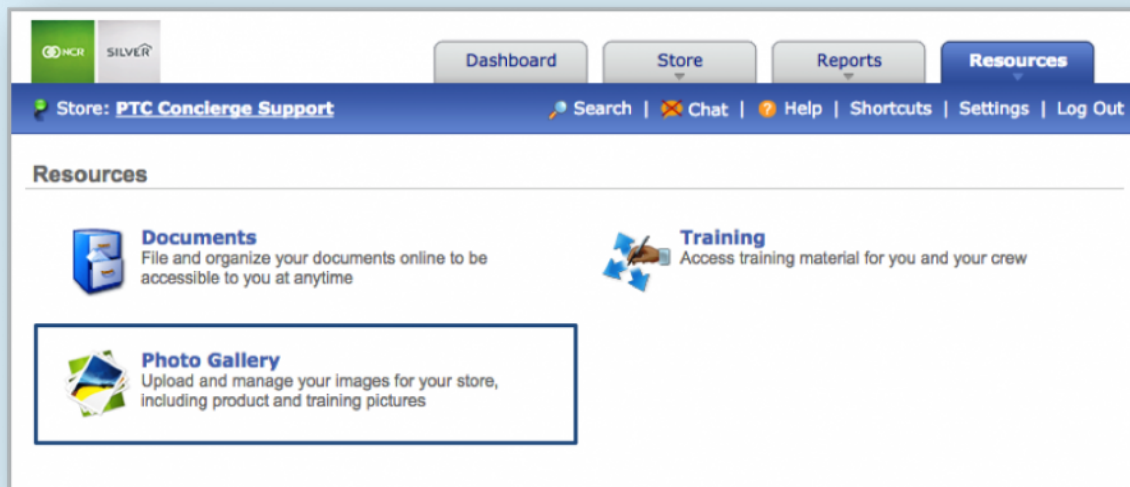
	Today	Prev Week	Prev Year
Sales	\$253	\$562	\$391
Checks	10	10	6
Average Check	\$25.27	\$56.22	\$65.16

	Curr WTD	Prev WTD	Prev Yr WTD
Sales	\$313	\$575	\$456
Checks	14	11	11
Average Check	\$22.36	\$52.24	\$41.44

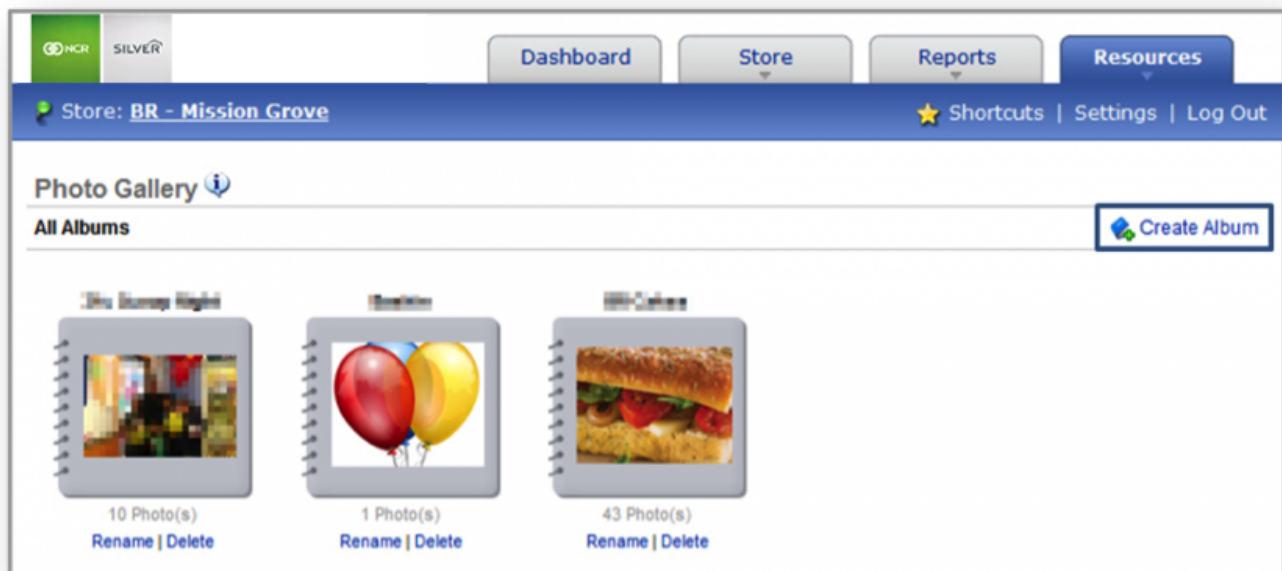
	May Sales	Target	May 2016 MTD
PTC Concierge Suppor..	\$1,749	N/A	\$11,480
Silver Gift Shoppe	\$170	N/A	\$2,071

Basis	Year Sales	Week Sales
4 Weeks	\$160,562	\$3,088

* **Hint:** You can also access *Training* by clicking on the **Resources** tab and then on **Photo Gallery**.



STEP 2: From here, click on the photo or album wish to access. Keep in mind that others can post to your Photo Gallery as well. There is no limit to the number of albums or images you can store! To create an album, click **Create Album** at the top right corner of the page.



Related Topics

Documents

Videos & Training

Release Notes

With each version, we're bringing you more great features that will make running your business even smoother and more time efficient! For detailed information and articles, please select a release below.

[v4.3.3 Release \(July 2017\)](#)

[v4.3.2 Release \(July 2017\)](#)

[v4.3.1 Release \(June 2017\)](#)

[v4.3.0 Release \(June 2017\)](#)

[v4.2.7 Release \(June 2017\)](#)

[v4.2.6 Release \(May 2017\)](#)

[v4.2.5 Release \(May 2017\)](#)

[v4.2.4 Release \(April 2017\)](#)

[v4.2.3 Release \(April 2017\)](#)

[v4.2.2 Release \(March 2017\)](#)

[v4.2.1 Release \(March 2017\)](#)

[v4.2.0 Release \(March 2017\)](#)

[v4.1.0 Release \(February 2017\)](#)

v4.3.3 – July 2017

Release Notes

Salaried Employee Costs included in Work Schedule

Labor costs are now calculated for your salaried employees included in the work schedule. Now, the total labor costs and estimated labor percentages more accurately measure planned labor expenses. Salaried costs are normalized to a daily rate, that is applied regardless of scheduled hours.

Requires Employee Management subscription. Available with all POS integrations.

Take Inventory History

Now you can review the history of inventory takes directly from the Take Inventory module. Simply click “View History” from “More Options” to view submission details and/or modify records.

Requires Inventory Management subscription. Available with all POS integrations.

v4.3.2 – July 2017

Release Notes

NEW! Aloha Labor Reports

Detailed labor reports are now available to Console customers with the Aloha point of sale integration. Reports include:

- Employee History: View a history of notes on all of your employees
- Time Card: View time card details for a given period of time
- Time Card Discrepancy: Compare employee schedules and their actual time cards

Requires Employee Management subscription. Available with Aloha POS integration.

NEW! Aloha Tax Category Report

Now you can easily access details as tax category, tax amount, and tax rate from the new Tax Report. Requires subscription to Console Advanced Reporting. Available with Aloha integration.

Employee Notes Enhancement

Employee notes have been enhanced to display the creator's name and timestamp. This enhancement also identifies the user and timestamp for which a note was last modified.

Requires Employee Management subscription. Available with all POS integrations.

“Mistake” Inventory Reconciliation Reason

By popular demand, “Mistake” is an available inventory reconciliation reason.

Requires Inventory Management subscription. Available with all POS integrations.

v4.3.1 – June 2017

Release Notes

Sales Breakdown from Day-to-Day

With the 4.3.1 release of NCR Console, you can drill down to the Sales Breakdown from the Day-to-Day calendar. When viewing the daily details in the Day-to-Day calendar, just click the net sales link to access the Sales Breakdown.

Requires Advanced Reporting subscription. Available with all POS integrations.

Sales Breakdown from Daily Summary

You now have easy access to the Sales Breakdown directly from the the Daily Summary. Simply click the net sales amount in the Daily Summary report to view more detailed transactional information.

Requires Advanced Reporting subscription. Available with all POS integrations.

v4.3.0 – June 2017

Release Notes

Guest Count

Guest count details captured at the point of sale are now available throughout Console reporting. Guest count is available in the Sales report, the Daily Summary, and the Key Indicator. Additionally, guest count can be found on the dashboard, in the Sales Breakdown, and in Check Details.

Don't fret if your POS brand doesn't capture guest count. In these cases, the guest count quantity will equal the check count quantity.

Requires Advanced Reporting subscription. Available with all POS integrations.

Custom Suggested Sales Target

The suggested sales target tool was enhanced to give you more control over your goals. You can now use the tool to set goals in any amount (positive or negative).

Requires Advanced Reporting subscription. Available with all POS integrations.

v4.2.7 – June 2017

Release Notes

Day-to-Day Report

The Day-to-Day report is now available in the store portal reports module. You can now easily view information captured in the day-to-day calendar through a single report. This level of reporting allows you to track the daily activity that is meaningful to your business.

Requires Advanced Reporting subscription. Available with all POS integrations.

Inventory Reconciliation Reasons

Create inventory reconciliation reasons that are unique to your business, so that you can more effectively track your inventory history. Follow these steps to manage custom reasons:

1. Log into your store portal account
2. Navigate to the "Take Inventory" page
3. Click "Manage Reasons" from the "More Options" link
4. Voilà! Create and modify reconciliation reasons

Requires Inventory Management subscription. Available with all POS integrations.

Time Card Discrepancy Report Enhancement

Understanding the financial impact of utilizing your workforce outside of scheduled hours has never been easier. The Time Card report has been updated to include the cost difference between scheduled and actual labor. For example, Bobby was scheduled to work 20hrs, but he actually worked 25hrs this week. At \$10 an hour, that's \$50 in unplanned labor costs!

Requires Employee Management subscription. Available with all POS integrations except Aloha.

Employee Record

Now you can quickly download an employee's record from their employee profile. The file captures personal information, contact information, pay history, and any notes for the employee.

Requires Employee Management subscription. Available with all POS integrations.

View All

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[v4.3.3 Release](#)

[v4.3.2 Release](#)

[v4.3.1 Release](#)

[v4.3.0 Release](#)

[v4.2.7 Release](#)

[v4.2.6 Release](#)

[v4.2.5 Release](#)

[v4.2.4 Release](#)

[v4.2.3 Release](#)

[v4.2.2 Release](#)

[v4.2.1 Release](#)

[v4.2.0 Release](#)

[v4.1.0 Release](#)