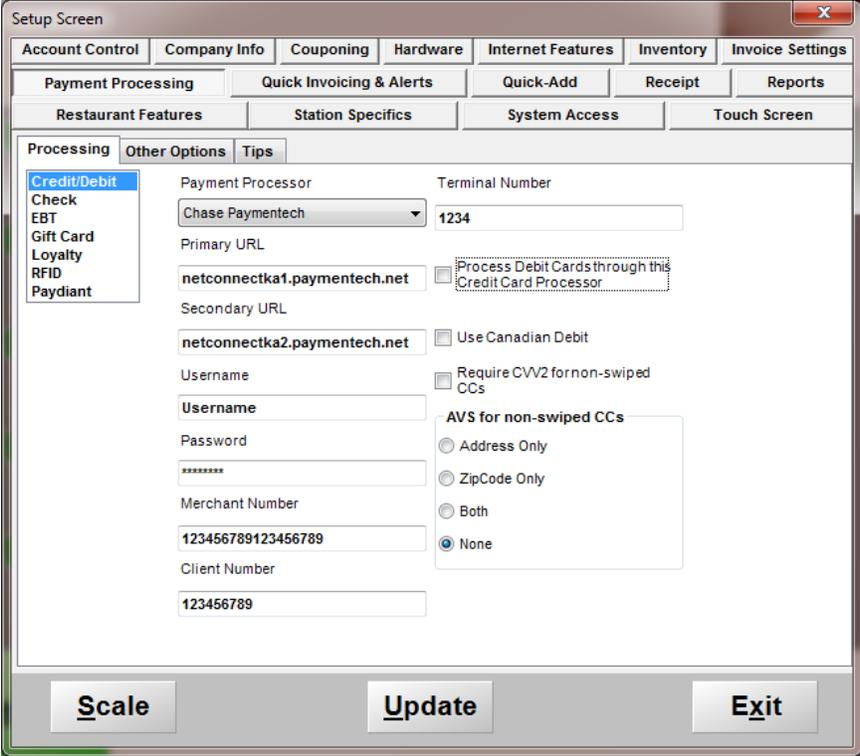# Configure and Use Bar Tabs

In order for **Bar Tabs** to work a Credit Card processor has to be setup prior to creating them.

Configure your credit card processor in the **Setup Screen** under **Payment Processing** on the Processing **tab**:

Bar Tab Settings

Manager **Options**	1. Open **CRE/RPE**. 2. Select the **Manager** or **Options** button. 3. Enter the administrator password (default: admin) where applicable. 4. Select **Setup** then, **Setup Screen**.
Payment Processing **Restaurant Features** **Processing** | **Other Options**	5. Select the **Payment Processing** tab. Here is where all the options are set for the Bar Tabs. 6. Select the **Other Options** tab.
Pre-Authorize Credit Cards (Bar Tabs) For $ $0.00 Pre-Authorize Cards Prompt ⦿ Force Preset Amount ○ Use Amount as Suggested	7. **Pre-Authorize Credit Cards (Bar Tabs) for $** • When a card is pre-authorized, this is the amount that it will be authorized for. 8. **Pre-Authorize Cards Prompt** • Will force the authorized amount to be the amount set in the **Pre-Authorize Credit Cards** option. • Use the amount from the **Pre-Authorize Credit Cards** option as default, but will allow the user to change the amount.
When Starting a New Tab: ⦿ Do Nothing ○ Force Credit Card Pre-Auth ○ Allow Pre-Auth to be Bypassed	9. **When Starting a New Tab** – this controls how the **New Tab** button behaves. • Do Nothing – this option will prompt for a name, and go straight into the invoice screen. • Force Credit Card Pre-Auth – immediately displays the credit card screen so you can swipe the customer's card. It doesn't allow you to start a new tab unless a credit card was successfully pre-authorized. • Allow Pre-Auth to be Bypassed – asks if you want to pre-authorize a card. If you select no, then it will behave the same as the **Do Nothing** option.
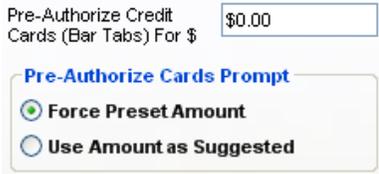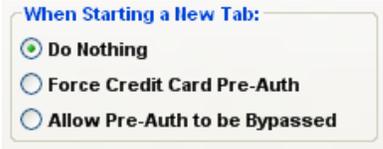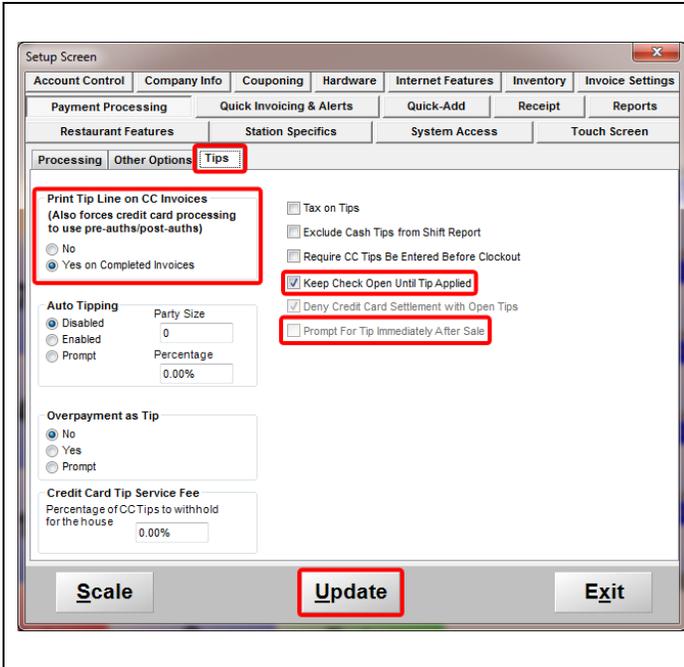
10. Select the **Tips** tab and set Print Tip Line on CC Invoices to **Yes**.

It is also recommended to enable the option **Keep Check Open Until Tip Applied**.

Note: The option **Prompt For Tip Immediately After Sale** can't be used with the bar tabs feature. When any of the Bar Tabs options have been configured on the other options tab this option will be disabled and grayed out.

11. Select **Update** when finished.

In order to use Bar Tabs the restaurant must be setup in one of the following ways:

- o The Business type Must be using **A Fine-Dining Restaurant with Table Service**.

    Or

- o The Business type Must be using **A Quick-Service Restaurant with Counter Service** with the option **Prompt Table** enabled (on the **Functionality** tab of the **Restaurant Features** section of the **Setup Screen**).

To set the Business type select **File** then choose **Select Business Type** from the **Login Screen** then enter your credentials. You will then be able to select the business type you would like to use.

Bar Tabs Implementation

To start a new bar tab, login to RPE select the **New** button on the **Open Tabs** screen.

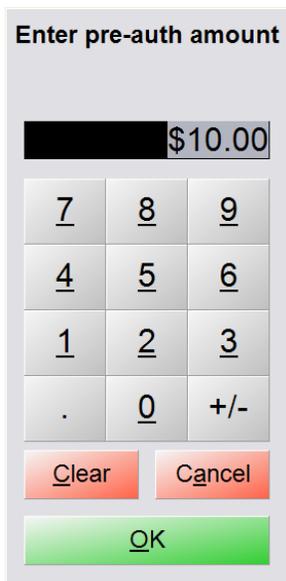| Exit to Login	Edit Layout	Options	Takeout	Delivery	Open Tabs	Quick Tab	Current Server 100101
NEW							
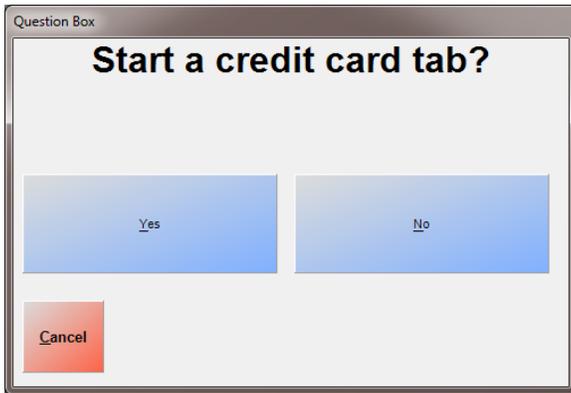
Question Box **Start a credit card tab?** Yes　　　　No Cancel	If the option **When Starting a New Tab** is set to **Allow Pre-Auth to be Bypassed**: • You will be prompted to whether or not you would like to start a credit card tab (Bar tab), select **Yes**.
Enter pre-auth amount $10.00 7　8　9 4　5　6 1　2　3 .　0　+/- Clear　Cancel OK	• If you have the option **Pre-Authorize Cards Prompt** set to **Use Amount as Suggested**, then you will be given a chance to change how much the card should be authorized for. • If you have the option **Pre-Authorize Cards Prompt** set to **Force Preset Amount**, then you will only be able to pre-authorize the customer's card for the amount specified in the **Pre-Authorize Credit Cards (Bar Tabs) for $** field.

- Next, you will be presented with the credit card screen. Swipe the customer's credit card into this screen. If you are using a MSR that is reading the data from Track 1 and 2, the customer's name will be read from the credit card at this time.

  o Once the card processes, if the program was able to read the name from the card, it will be used as the name for the new tab. If the name read from the card was John Smith, then the tab name will be J.Smith.

Note: If two John Smith's opened tabs, the 2nd one will have a tab named J.Smith-2.

  o If the program was unable to read the name from the card, you will be required to enter a name at this time.

- Now you can place items on the order and put the invoice on hold. You may recall and add more items at any time. Once you are ready to complete the invoice, just select the **Pay** button. This will display the amount tendered screen.

- When **Pay** is selected you will be notified that a **Pre-authorized card available** to complete the invoice.

- You will then be able to pay out the invoice with any other tender type – if the customer would not like to close the invoice to the card that was pre-authorized.
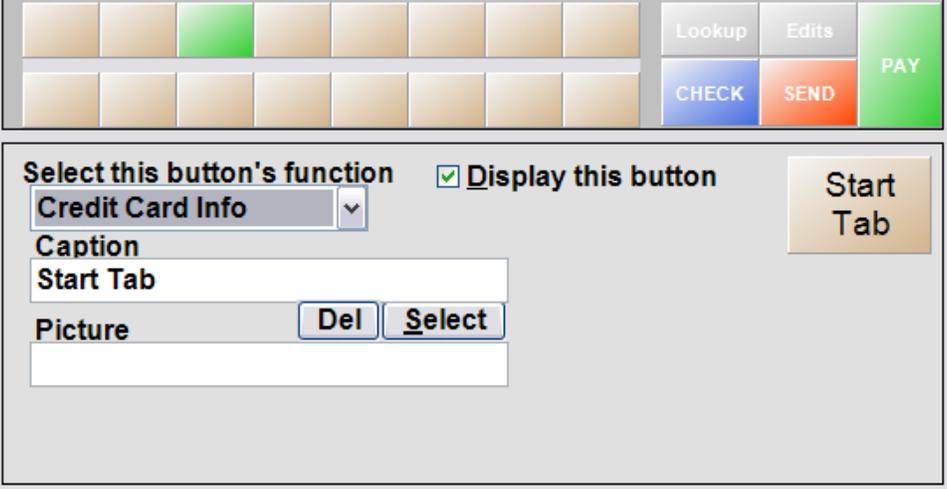

Question Box
 	
There is a pre-authorized card available, would you like to use it?
 	
Yes   No
 	
Cancel
	• If the **Credit Card** button is pressed, the program will notify you that a card has already been pre-authorized for the order, and ask if you want to use it to complete the sale.
	
	   o Press **Yes** to charge the pre-authorized card.
	
	   o Press **No** to display the credit card screen and use a different card.
	
	The transaction will then be closed.

Bar Tabs – Other Options

You can also setup a custom button to start a new tab, or change the credit card that is currently associated with the invoice.

Manager **Options**	1. Open **CRE/RPE**. 2. Select the **Manager** or **Options** button. 3. Enter the administrator password (default: admin) where applicable. 4. Select **Setup** then, **Touch Screen Configuration**.

5. On the **General** tab:

   o Select one of the buttons at the bottom of the screen diagram.

   o Use the dropdown to select the **Credit Card Info** option under **Select this button's function**.

   o Select **Display this Button**.

   o Enter a **Caption** (This is what will be displayed on the button).

   o Optionally select a **Picture** to be displayed on the button.

6. Select **Save & Exit** when finished.