CommBank

Open Tab App
User Guide

Contents

CAN

Introducing Open Tab

Open Tab app makes managing customer tabs easy.

Manage tabs in four easy steps

1 Get started
Open Tab is available for fast download from App bank.

2 Customise
Choose your settings to suit your customers and your business.

3 Manage open tabs
Open new tabs, add to a tab, and pay tabs in a few simple taps.

4 Create reports
Create instant tab reports that put information at your fingertips.

We're here to help

If you need help using Open Tab, call**1800 230 177**, 24 hours a day, 7 days a week.

CAN

1. Getting started

In this section:

- Downloading the app
- Getting to know the Open Tab app

Downloading the app

| Download the app from App bank	1. On the Albert device, tap the **App bank** icon. This will direct you to the App bank website.	
	2. Tap the Apps tab to show a list of available apps.	
	3. Search for **Open Tab** in the search box.	
	4. Tap the Open Tab icon to open the App details page.	
	5. Select **Install** to install the app.	
	6. Follow the prompts on screen and tap **Install** to download the app to your device.	
	Your Open Tab app is now ready to use.	
Tips	■ You can also access the App bank store online directly at **http://www.piappbank.com.au**.	
	■ To download the app on more than one terminal, go to the App bank website directly.	

Getting to know the Open Tab app

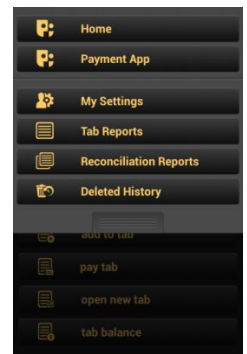| The home screen	■ When you launch the **Open Tab** app, the home screen displays.	
	■ The home screen provides a graphical view of:	
	▪ The amounts owing on all open tabs.	
	▪ The total of all tabs.	
	▪ The amount exceeding tab limits.	
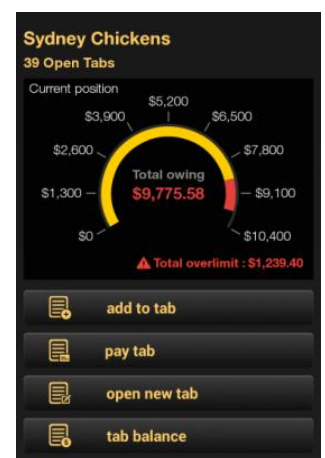
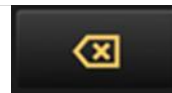| Merchant Context Menu | ▪ The Merchant Context Menu gives you access to some of Open Tab's functions. | |
	▪ To open the Merchant Context Menu, tap the **Merchant Context** button on the Open Tab home screen or swipe down the screen with two fingers.	
	▪ To exit the Merchant Context Menu, tap the bottom bar, swipe upwards with two fingers, or press the Merchant Context button.	
	Tip: You can use the Merchant Context Menu to access the Payment app, or to exit the app and go to the Albert Home screen.	
The buttons	**Back**: Tap to go back to the previous screen. This will clear any unsaved data.	
	Clear: Tap once to clear one digit.	
	Note: The buttons are disabled until you enter data.	

2. Customising the Open Tab app

We've designed Open Tab so it can be tailored to your business needs. You can control tab limits and security.

In this section:

- Accessing Open Tab settings
- Setting tab limits
- Setting your password
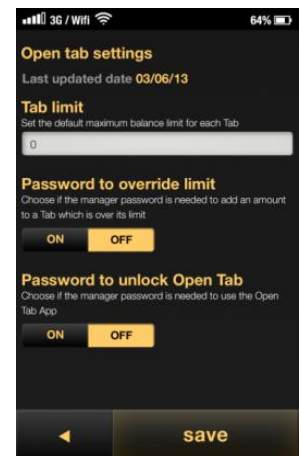- Resetting the customer password

Accessing Open Tab settings

| Purpose	To set tab limits and set passwords for the app.
My Settings	- In the Merchant Context Menu from Open Tab, tap **My Settings** to change the default preferences. - From the Open Tab settings you can set tab limits and set passwords for the app.

Open Tab app options

Tab limits	
Tab limit	The tab limit for each tab is automatically set to 0 by default.
	To change the default setting, tap the **Tab Limit** field and choose from a drop down selection.
	You can change this limit for each individual tab when you set it up or at a later time.

Passwords	
Password to override limit	You can choose to allow a tab to go over its limit when a Manager Password is entered.
	To enable the override password, tap or slide the bar to **ON**.
	To disable the override password, tap or slide the bar to tap **OFF**.
Password to unlock Open Tab	You can choose to lock the Open Tab app and functions with a password.
	To enable password, tap **ON.**
	To disable password, tap **OFF**.
Reset customer password	You can reset the password a customer uses for their tab. To do this, tap **Reset Password and enter the Manager Password.** Have your customers key in a new password in the **Enter new password** and **Confirm new password** fields, then tap **Reset Password**.

CAN
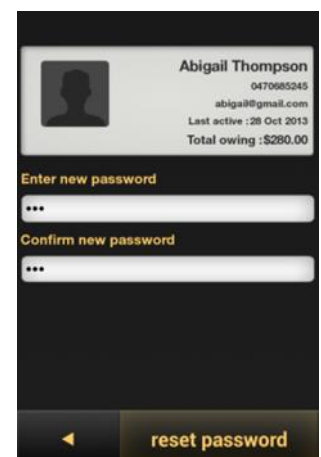
3. Managing tabs

Whether you want to check a tab's balance, add a new tab or accept payment for a tab, the Open Tab app makes managing your tabs simple.
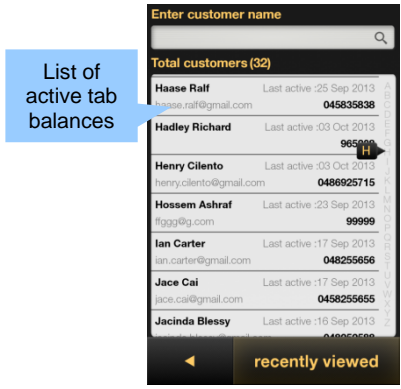
In this section:

- Checking tab balances
- Finding a customer tab
- Opening a new tab
- Adding to a tab
- Accepting payment for a tab
- Deleting a tab

Checking tab balances

| Purpose	To view a list of all open tabs.
Tab balance	1. From the Open Tab home screen, tap **Tab Balance**. A list of all open tabs displays.
Tip	■ Customers are listed in alphabetical order by first name.

List of active tab balances

Open Tab User Guide

Finding a customer tab

Purpose	Locate a specific customer's tab and check the amount owing.

Find a customer tab	2. From the Open Tab home screen, tap **Tab Balance**.
	3. Search for the customer tab, by either:
	■ Tapping **Enter customer name** and using the key pad to search for name.
	■ Swiping up or down the screen.
	■ Using the alphabet at the right of the screen to pick a letter to jump to the customer name.

List of active tab balances
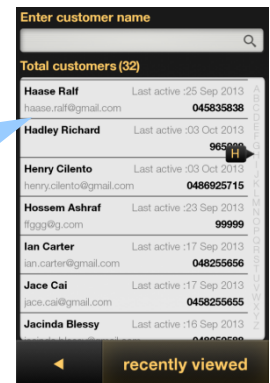
Tip	If it is a recent tab, you can find a tab by tapping **Recently Viewed**.

Open Tab User Guide

◆ CAN

Opening a new tab

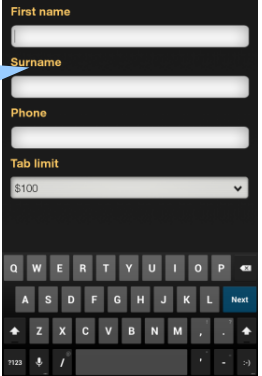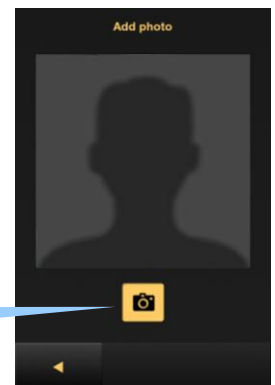| Purpose	To open a new tab for a customer.
Open new tab	1. From the home screen, tap **Open New Tab**. 2. Tap in each field and use the keypad to enter the mandatory tab details: ■ **First name.** Key in the customer's first name. ■ **Surname.** Key in the customer's last name. ■ **Phone.** Enter a contact number for the customer. ■ **Tab limit.** Enter the maximum amount allowed for this tab. 3. If required, tap **More Details** to add a photo, email address, customer password, or additional users of the tab. ■ To take a photo, tap **Add Photo**, point the Albert camera at the customer, and tap the **photo icon**. ■ You can scroll through the customer details pages by tapping **Next**, or swiping left and right. 4. When you are finished entering tab details, tap **Register**.	
Tips	■ Tap **Next** to move between fields when entering customer details. ■ You can edit or delete a tab at any time.

Adding to a tab

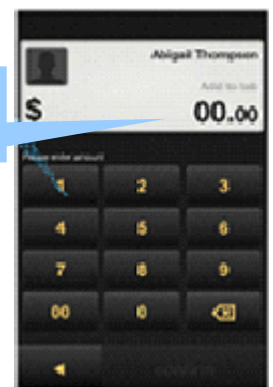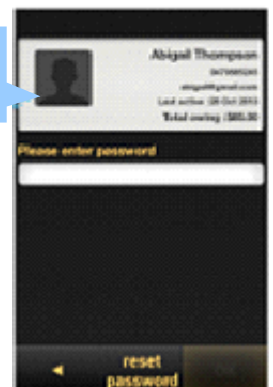| Purpose	Add an amount to an existing customer tab.
Add to tab	1. From the Open Tab home screen, tap **Add to Tab.** The **Tab list** will display. 2. Search for the customer tab, by either: ▪ Tapping **Enter customer name** and using the key pad to search for name. ▪ Swiping up or down the screen. ▪ Using the alphabet at the right of the screen to pick a letter to jump to the customer name. 3. Tap the required tab to select it, then use the key pad to add an amount. 4. Tap **OK**. ▪ Enter the customer password if prompted. ▪ If the customer is over the limit, a notification will appear. You can go ahead by tapping **Add to tab anyway** and entering the Manager Password to override the limit (if this setting is turned on in Open Tab settings).
Tips	If there are three failed attempts, the **Reset password** option will appear (go to Section 2).

Open Tab User Guide

◆ CAN

Accepting payment for a tab

Purpose	To accept payment for a tab.

Pay tab	1. From the Open Tab home screen, tap **Pay Tab**.
	2. Search for the customer tab, by either:
	■ Tapping **Enter customer name** and using the key pad to search for name.
	■ Swiping up or down the screen.
	■ Using the alphabet at the right of the screen to pick a letter to jump to the customer name.
	The amount of the tab displays.
	3. Tap:
	■ **Full** to settle the total amount, or
	■ **Partial** to settle part of the amount. Use the keypad to enter the partial amount.
	4. Choose the payment method:
	■ If paying by cash, tap **Cash**, and confirm by tapping **Pay**.
	■ If paying by card, tap **Card**. Payment app will then open. Enter the payment amount, tap **OK**. Tap/swipe/insert the card, and choose the account type. After the PIN or signature is accepted, the receipt will display. Open Tab will then reopen to account for the tab payment.
	Once the payment is accepted, the receipt will display in Open Tab.
	5. Tap **Email** or **Print** to give the customer a copy of the receipt, or tap **Finish** for no receipt.

Tips	■ The receipt is emailed as a .jpeg attachment.
	■ The Payment app will generate a separate receipt for the payment.
	■ The subject of the email is 'Open Tab Receipt', and the body content of the email is 'Thank you'.
	■ If you want to change your outgoing email settings, see the **Albert User Guide**.

Deleting a tab

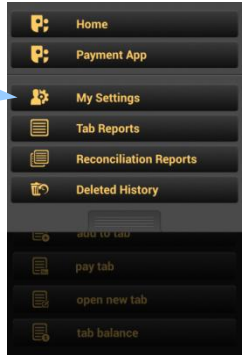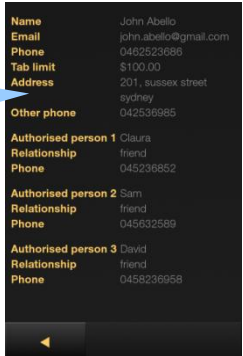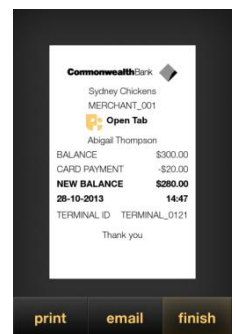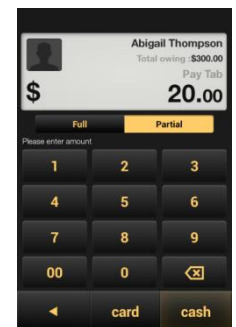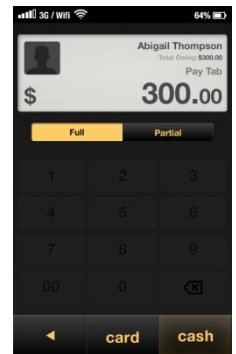| Purpose	To waive payment by deleting a tab.
Delete tab	1. From the Open Tab home screen, tap **Tab Balance**. 2. Search for the customer tab, by either: ■ Tapping **Enter customer name** and using the key pad to search for name. ■ Swiping up or down the screen. ■ Using the alphabet at the right of the screen to pick a letter to jump to the customer name. 3. Tap on the tab to delete, then, press the **Merchant Context** button or 2 finger swipe down the screen to open the Merchant Context Menu. 4. Tap **Delete {Tab Name}**. You will be prompted to confirm the deletion and enter a manager password. 5. Tap **Delete Tab**.
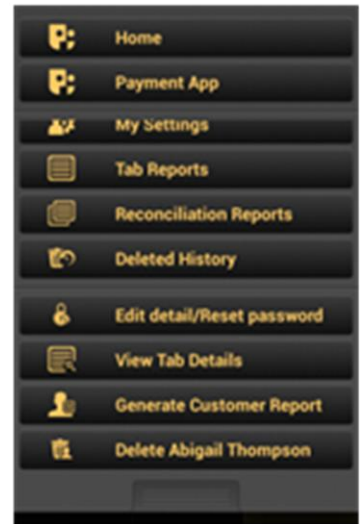
4. Creating tab reports

Keep track of your tabs and outstanding payments and have reports sent directly to your inbox.

In this section:

- Generating deleted history reports
- Generating tab reports
- Generating reconciliation reports
- Generating customer reports
- Emailing reports

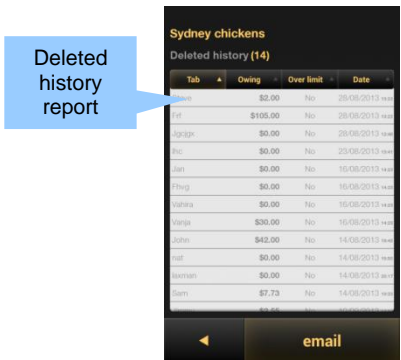## Generating deleted history reports

Purpose	To view a list of any tabs that were previously deleted. You may need to do this for a customer or the merchant.
Deleted history	1. From the Open Tab home screen, press the **Merchant Context** button or 2 finger swipe down the screen to open the Merchant Context Menu. 2. Tap **Deleted History** to open a list of all deleted tabs. 3. Use the buttons at the top to choose the sort order for the list. Tap once for ascending order, twice for descending order. 4. Tap a row to view the customer's details. 5. Tap **Email** to send the report of all deleted tabs. Key in the email address, then tap **Email** again.
Tips	- The report is emailed as a .csv attachment. - The subject of the email is 'OpenTab – Deleted Tabs Report'.

Merchant context menu

Customer details screen

Generating tab reports

| Purpose	To create a report detailing all active tabs.
Tab reports	1. From the Open Tab home screen, press the Merchant Context button or 2 finger swipe down the screen to open the Merchant Context Menu. 2. Tap **Tab Reports** to open a list of all active customer tab accounts and details. 3. Use the buttons at the top to choose the sort order for the list. Tap once for ascending order, twice for descending order. 4. Tap a row to view the customer's details. 5. To email the report, tap **Email**, key in the email address, and tap **Email** again.
Tips	▪ The report is emailed as a .csv attachment. ▪ The subject of the email is 'OpenTab –Tab Report'.

Deleted history report

Generating reconciliation reports

Purpose	To be used as a tool when reconciling across all terminals at the end of the day. Create a report of all tab inflows and outflows across all terminals.

| Reconciliation reports	1. From the Open Tab home screen, press the Merchant Context button or 2 finger swipe down the screen to open the Merchant Context Menu.	
	2. Tap **Reconciliation Reports** to view a list of all active terminals and the amount that has been added to customer tabs, paid off in cash, or paid off on card for the selected time frame.	
	3. To select the time frame to view all terminal tab inflows and outflows tap a tab at the top of the list to choose the reporting period, or use the **Select Date Range** tab to create a report for a specific period. Use the **+** and **–** buttons to enter dates, then tap **OK**.	
	4. To email the report, tap **Email**, key in the email address, and tap **Email** again.	
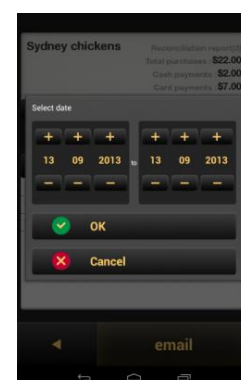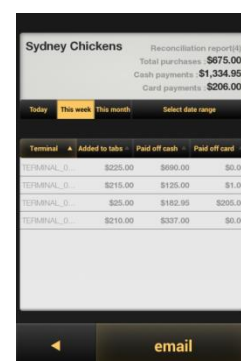
| Tips	▪ Use this report to reconcile all terminals with inventory, cash, card payments, and customer tabs.
	▪ You can report on a period up to 13 months, which is how long Open Tab stores tab data.
	▪ The report is emailed as a .csv attachment.
	▪ The subject of the email is 'OpenTab – Reconciliation Report {date range}'.

CAN

Generating customer reports

Purpose	To create a report of a customer's tab activity and balance.

Customer reports	1. From the Open Tab home screen, tap **Tab Balance**.

2. Search for the customer tab, by either:

   ■ Tapping **Enter customer name** and using the key pad to search for name.

   ■ Swiping up or down the screen.

   ■ Using the alphabet at the right of the screen to pick a letter to jump to the customer name.

3. Tap to select the tab, then press the Merchant Context button or 2 finger swipe down the screen to open the Merchant Context Menu.

4. Tap **Generate Customer Report** to show all tab transactions for the customer.

5. Use the buttons at the top to choose the sort order for the list. Tap once for ascending order, twice for descending order.

   ■ Tap **Print** to print a report.

   ■ Tap **Email** to send the report by email. Key in the email address – either the customer email or your email, then tap **Email** again.

Merchant context menu
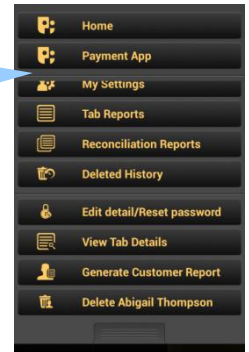
Customer report
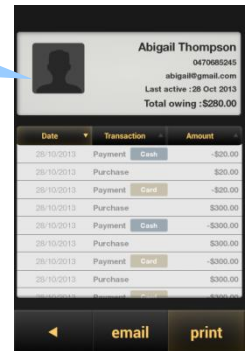
Tips	■ The report is emailed as a .jpeg attachment from the email set up in the Albert device settings.
	■ The subject of the email is 'OpenTab – Transaction Details'.

Emailing reports

Purpose	To email a customer report to the customer or email a merchant report as a .csv file for your own use. .

Email a report	1. Tap **Email** when viewing the report on screen.

2. Tap the **Enter email address** and key in the email address.

3. Tap **Email** when ready.

   Once the email has sent, the screen will return to the on screen report.

Email entry screen
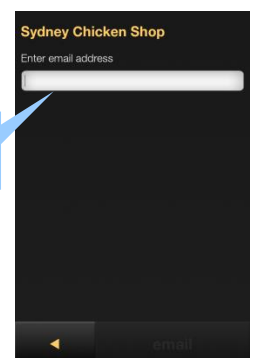
Need help?

We're here to assist — whenever you need us.

Help with Albert, App bank, and CBA Apps	1800 230 177. Commonwealth Bank Business Service Centre 24 hours a day, 7 days a week
Help with third party apps	1. On Albert, tap the App bank app, or visit piappbank.com.au. 2. Select **Apps**, then search the relevant app name. Click into the app to see **App Details** and expand **Support** to see the contact details for the responsible developer.