CommBank Open Tab App User Guide

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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.





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

- 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.
- 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.



- 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.

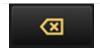
Tip: You can use the Merchant Context Menu to access the Payment app, or to exit the app and go to the Albert Home screen.



The buttons



Back: Tap to go back to the previous screen. This will clear any unsaved data.



Clear: Tap once to clear one

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

	Open rub 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. Abigail Thompson O470605245 abigail@gmail.com Last etter :20 Oct 2013 Total owing :\$290.00 Enter new password Confirm new password Confirm new password	





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		Enter customer name	
	Balance. A list of all open tabs displays.	List of active tab	Total customers (32) Haase Ralf Last active :25 Sep 2013 haase ralf@gmail.com 045835838
		balances	Hadley Richard Last active :03 Oct 2013
			Henry Cilento Last active :03 Oct 2013 henry.cilento@gmail.com 0486925715
			Hossem Ashraf Last active :23 Sep 2013 M N 99999 Sep 2013 M N Sep 2013 M N N N N N N N N N N N N N N N N N N
			lan Carter Last active :17 Sep 2013 Para ian.carter@gmail.com 048255656
			Jace Cai Last active :17 Sep 2013
			Jacinda Blessy Last active :16 Sep 2013 Z
Tip	Customers are listed in alphabetical order by first name.		▼ recently viewed



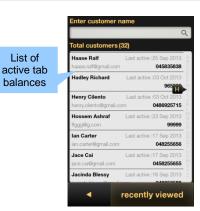
Finding a customer tab

Purpose

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

Find a customer tab

- 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.



Tip

If it is a recent tab, you can find a tab by tapping **Recently Viewed**.



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: 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

7 10 01 19 10 01 100		
Purpose	Add an amount to an existing customer tab.	
Add to tab	 From the Open Tab home screen, tap Add to Tab. The Tab list will display. 	List of tabs
	2. Search for the customer tab, by either:	Alliquel Trumpeum Lair Allian All Cur 2013 2 de de garding-mal currer de Commission :
	Tapping Enter customer name and using the key pad to search for name.	Adam Transparid Last action (ICCL) (ICCL) Abor John Last action (ICCL) (ICCL) des gard de for core on despisioner
	Swiping up or down the screen.	Segunia Abel Last active (850ct 2013) ** temporia abelt 200 yrali com \$44250000
	Using the alphabet at the right of the screen to pick a letter to jump to the customer name.	Obself Area Leaf active (MC-OL-2015) Publish Methors Leaf active (MC-OL-2015) Indian method-type active O429-20000
	Tap the required tab to select it, then use the key pad to add an amount.	recently viewed
	4. Tap OK .	
	Enter the customer password if prompted.	Abigal Thompson
	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).	Add amount here
		4 5 6
	·	7 8 9
Tips	If there are three failed attempts, the Reset password option will appear (go to Section 2).	00 0 🐨
		■ CONTRACTOR
		Customer password screen
		Please enter password
		reset



Accepting payment for a tab

Accepting paymer	nt for a tab	
Purpose	To accept payment for a tab.	
Pay tab	 From the Open Tab home screen, tap Pay Tab. 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. Tap: Full to settle the total amount, or Partial to settle part of the amount. Use the keypad to enter the partial amount. 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 	Abigail Thompson Full Pertial Abigail Thompson Full Pertial Card Cash Abigail Thompson Total owing: \$300.00 Pay Tab Abigail Thompson Total owing: \$300.00 Pay Tab Card Cash Abigail Thompson Total owing: \$300.00 Pay Tab Card Cash Abigail Thompson Total owing: \$300.00 Pay Tab Card Cash
	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. Tap Email or Print to give the customer a copy of the receipt, or tap Finish for no receipt.	Sydney Chickens MERCHANT_OT Per Tab Abgail Thompson BAUANCE CARD PRYMENT \$20.00 NEW BALANCE \$200.00 28-10-2013 1447 TERMINAL ID TERMINAL_0121 Thank you
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'. 	print email finish

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	 From the Open Tab home screen, tap Tab Balance. 	P; Home
	2. Search for the customer tab, by either:	Payment App
	Tapping Enter customer name and using the	My Settings
	key pad to search for name.	Tab Reports
	Swiping up or down the screen.	Reconciliation Reports
	Using the alphabet at the right of the screen to pick a letter to jump to the customer name.	Deleted History
	3. Tap on the tab to delete, then, press the Merchant	& Edit detail/Reset password
	Context button or 2 finger swipe down the screen	View Tab Details
	to open the Merchant Context Menu.	Generate Customer Report
	4. Tap Delete {Tab Name} . You will be prompted to	Delete Abigail Thompson
	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	o view a list of any tabs that were previously deleted. Yustomer or the merchant.	ou may need to do this for a	
Deleted history	From the Open Tab home screen, press the Merchant Context button or 2 finger swipe down the screen to open the Merchant Context Menu.	Merchant context menu Home Payment App Wy Settings	
	 Tap Deleted History to open a list of all deleted tabs. 	Tab Reports Reconciliation Reports	
	 Use the buttons at the top to choose the sort order for the list. Tap once for ascending order, twice for descending order. 	Deleted History Source Lab pay tab	
	. Tap a row to view the customer's details.	open new tab	
	. Tap Email to send the report of all deleted tabs. Key in the email address, then tap Email again.	Name John Abello	
Tips	The report is emailed as a .csv attachment.	Customer details Enall phnabel@ggnal.com Phone 0492523686 Tab limit \$100.00 Address 201, sussex street	
	The subject of the email is 'OpenTab – Deleted Tabs Report'.	Other phone 042536885 Authorised person 1 Claura Relationship friend Phone 045238852	



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. Deleted history report	Sydney chickens Deleted history (14) Tab
	Tap Tab Reports to open a list of all active customer tab accounts and details.	Apolips: \$0.00 No 28.082613 were Apolips: \$0.00 No 23.082013 were Apolips: \$0.00 No 23.082013 were Apolips: \$0.00 No 16.082013 were
	Use the buttons at the top to choose the sort order for the list. Tap once for ascending order, twice for descending order.	Fing \$0.00 No 10.00,000 S No 10.00,000 No 10
	4. Tap a row to view the customer's details.	Sem \$7.78 No 14-08/2013 was
	To email the report, tap Email, key in the email address, and tap Email again.	∢ email
Tips	The report is emailed as a .csv attachment.	
	The subject of the email is 'OpenTab –Tab 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

- From the Open Tab home screen, press the Merchant Context button or 2 finger swipe down the screen to open the Merchant Context Menu.
- 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.
- 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**.
- 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}'.



Generating customer reports

Purpose

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

Customer reports

- From the Open Tab home screen, tap Tab Balance.
- 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.
- Tap to select the tab, then press the Merchant Context button or 2 finger swipe down the screen to open the Merchant Context Menu.
- Tap Generate Customer Report to show all tab transactions for the customer.
- 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.
- The subject of the email is 'OpenTab Transaction

Merchant context menu







Tips

- The report is emailed as a .jpeg attachment from the email set up in the Albert device settings.
- 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

- Tap **Email** when viewing the report on screen.
- Tap the Enter email address and key in the email address.
- Tap **Email** when ready.

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







Need help?

We're here to assist —	whenever	you need us.
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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	1. On Albert, tap the App bank app, or visit piappbank.com.au.
apps	 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.