

SmartTab

- [SmartTab Customer Setup](#)

SmartTab Customer Setup

Cloud Integration

1. Open the staff area.

Once logged into your SmartTab portal as an admin, click the “staff” link in the left navigation menu.



2. Create a Bartrack role

Create the “Roles” tab at the top of the main window. Create a “Bartrack” role by typing the name on the left input and then clicking the “Add Role” button.

Staff

Staff Staff Scheduling Roles Discount Void Reasons

Reports			ADD ROLE	1
Privileges	DISHWASHER BOH	REPORTS		
SECURITY	Clockin Anytime	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	Clockin/Out Through Fingerprint Only	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	Login To POS Through Fingerprint Only	<input type="checkbox"/>	<input type="checkbox"/>	
	Clockout Requires All Checks Settled	<input type="checkbox"/>	<input type="checkbox"/>	
	Auto Logout After Sale/Send Action	<input type="checkbox"/>	<input type="checkbox"/>	
	View Cash Figures (Vs. Blind Drop)	<input type="checkbox"/>	<input type="checkbox"/>	
	No Auto-Clockout At Last Known POS Use	<input type="checkbox"/>	<input type="checkbox"/>	
ACCESS	POS Login Allowed	<input type="checkbox"/>	<input type="checkbox"/>	
	Edit All Tabs	<input type="checkbox"/>	<input type="checkbox"/>	
	Open Drawer \ No Sale	<input type="checkbox"/>	<input type="checkbox"/>	
	Assign Drawer To Other Employees	<input type="checkbox"/>	<input type="checkbox"/>	
	Open Any Assigned Drawer	<input type="checkbox"/>	<input type="checkbox"/>	
	Transfer Any Tab To Any User	<input type="checkbox"/>	<input type="checkbox"/>	
	Manager Approval Authority	<input type="checkbox"/>	<input type="checkbox"/>	
	Manage Station Name	<input type="checkbox"/>	<input type="checkbox"/>	

Click the edit pencil icon on your new BarTrack role.

REPORTS		
	<input type="checkbox"/>	
	<input type="checkbox"/>	
	<input type="checkbox"/>	

Select the following reports: Sales, Products, Inventory, Tabs. Save the settings by clicking the check mark.

Staff		Staff	Staff Scheduling	Roles	Discount	Void Reasons	Backend Staff	Backend Roles	
Privileges		OWNER						BARTRACK	
Sales		<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>	
Sales Venue		<input checked="" type="checkbox"/>						<input type="checkbox"/>	
Sales Employee		<input checked="" type="checkbox"/>						<input type="checkbox"/>	
Charts		<input checked="" type="checkbox"/>						<input type="checkbox"/>	
Products		<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>	
Inventory		<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>	
Timesheet		<input checked="" type="checkbox"/>						<input type="checkbox"/>	
Customer Management		<input checked="" type="checkbox"/>						<input type="checkbox"/>	
Admission		<input checked="" type="checkbox"/>						<input type="checkbox"/>	
Tabs		<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>	
Paid In/Out		<input checked="" type="checkbox"/>						<input type="checkbox"/>	

3. Create a new user.

Click the “Users” tab at the top left of the main window. Fill out the details as shown.

Staff

- Staff
- Staff Scheduling
- Roles
- Discount
- Void Reasons
- Backend Staff
- Backend Roles

Profile

Rights

STATUS

New

☐

Finger print enrollment required

Not done

EMPLOYEE ID

25

FIRST NAME

Bar

LAST NAME

Track

PRIMARY EMAIL

integrations@bartrack.beer

LOGIN EMAIL

Staff

- Staff
- Staff Scheduling
- Roles
- Discount
- Void Reasons
- Backend Staff
- Backend Roles

COUNTRY

United States of America

ADDRESS

Address

CITY

City

STATE

Select state

ZIP CODE

BACKEND ROLE

BARTRACK

ROLES

YOU CAN SELECT MULTIPLE ROLES

SAVE

Save the user.