

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.