

# 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.

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