

# Tab System Workflow

**Time Required:** 2-3 minutes to open tab, 1 minute to add orders, 3-5 minutes to close tab

**Who Does This:** Bar staff at Speakeasy bar or Live bar

**When:** Customer requests to open a tab for multiple orders

**System:** GPOS POS system, T001-T024 tab cards, credit card holder

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## Quick Reference - The Tab System At A Glance

### OPENING A TAB:

1. Customer asks to open tab
2. Request **CREDIT CARD ONLY** (not debit) and check expiry date
3. Find next available TAB card (T001-T024) in book
4. Place credit card in matching numbered slot
5. Give TAB card to customer
6. Open table in POS (Menu > Tables > Bar Tab > tap table number)
7. Take and serve initial order

### ADDING TO TAB:

1. Customer presents TAB card
2. Open table in POS (Menu > Tables > Bar Tab > tap table number)
3. Add drinks to order
4. Hit **Save**
5. Serve drinks

### CLOSING TAB:

1. Customer says "close tab" and returns TAB card
2. Open table in POS > tap **Total** > tap **Print**
3. Get credit card from matching slot in book
4. Show printed bill to customer
5. Ask "How would you like to pay?"
6. Process payment (cash/PromptPay/credit card)
7. Tab auto-closes when payment completes
8. Return credit card and receipt to customer
9. Put TAB card back in book slot

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# WHY WE USE TABS

## **Benefits for customers:**

- Don't have to pay for each drink separately
- Can order from either bar (Speakeasy or Live bar)
- Faster service (no repeated payment process)
- Can split payment at end if needed

## **Benefits for venue:**

- Guaranteed payment (we hold credit card)
- Higher spend (customers order more when not paying each time)
- Faster service (less payment transactions)
- Better cash flow tracking

## **When to suggest tabs:**

- Customer ordering multiple rounds
- Groups staying for whole event
- Regular customers who prefer tabs
- Busy nights when speed matters

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# EQUIPMENT & LOCATION

## Physical Components

### **TAB Card Holder (The "TAB Book"):**

- Flower-design name card holder
- Location: Speakeasy bar near POS station
- Contains 24 numbered slots (T001 through T024)
- Each slot has numbered sticker matching TAB card

### **TAB Cards:**

- Plastic cards numbered T001 through T024
- Customers carry these while tab is open
- Must be returned to close tab

## Credit Card Storage:

- Same holder as TAB cards
- Each numbered slot holds either:
  - TAB card (when available) OR
  - Credit card (when that tab is active)

## Visual System:

- Empty slot = TAB card is with customer (tab active)
- TAB card in slot = Available to use
- Credit card in slot = Tab active, customer has TAB card

## Security:

- Holder stored securely at Speakeasy bar
  - Not easily visible to customers
  - CCTV camera covers POS area
  - Only bar staff access
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# POS System

## Location in POS:

- Menu > Tables > Bar Tab

## Visual Display:

- Canvas showing all tables T001-T024
- Color-coded status system:
  - **Grey** = Not in use (available)
  - **Green** = Open with no orders yet
  - **Red** = Has unpaid orders
  - **Orange** = Bill printed (ready to close)

## How to tell which tabs are active:

1. Look at TAB book (empty slots = active tabs)
  2. Look at POS screen (non-grey tables = active)
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# OPENING A TAB (Step-by-Step)

# STEP 1: Customer Requests Tab

## Customer says:

“Can I open a tab?”

## You respond:

“Sure! I'll need your credit card to hold.”

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# STEP 2: Verify Credit Card (CRITICAL)

## What to check:

1. **Card type:** MUST be **CREDIT CARD**, NOT debit card
2. **Expiry date:** Card must not be expired
3. **(Best practice):** Check ID matches card name if possible

## How to identify credit card vs debit:

- Look for "CREDIT" or "DEBIT" text on card
- Credit cards usually say "Credit Card" on front
- Debit cards say "Debit Card" or "ATM Card"
- Ask customer: "Is this a credit card or debit card?"

## If customer only has DEBIT CARD:

“Sorry, we only accept credit cards for tabs to guarantee payment. You can pay for each order with cash or PromptPay instead.”

## Why credit cards only:

- Can tap/swipe to charge if customer forgets to close tab
- Debit cards require PIN (customer not present at end of night)
- Debit cards may have insufficient funds
- Credit cards have higher limits

## If card is EXPIRED:

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"Sorry, this card is expired. Do you have a different credit card?"

### What good looks like:

- Card is valid credit card
- Card not expired
- Customer confirms it's their card

## STEP 3: Find Next Available TAB Card

### How to find available card:

1. Look at TAB book holder
2. Find first slot that has **TAB card in it** (not a credit card)
3. This means that tab number is available
4. Note the number (e.g., T007)

### Visual check:

- TAB card in slot = Available
- Credit card in slot = In use (skip to next)

### If all slots have credit cards (all tabs in use):

- Rare scenario (usually only 1-2 tabs active per night)
- Tell customer: "Sorry, all our tabs are currently in use. You can pay per order with cash or PromptPay."
- Tell manager (we may need more TAB cards)

## STEP 4: Store Credit Card

### How to do it:

1. Take customer's credit card
2. Remove TAB card from matching numbered slot (e.g., T007)
3. Place credit card in that slot
4. Make sure it's secure and fully in slot

### IMPORTANT:

- Put card in CORRECT numbered slot
- Card must match TAB card number

- If you mix this up, you'll return wrong card to wrong customer

### What good looks like:

- Credit card securely in correct slot
  - You remember which number you used
  - TAB card now in your hand ready to give customer
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## STEP 5: Give TAB Card to Customer

### What to say:

“Here's your tab card number [T007]. Please keep this with you and show it whenever you order. You'll need to return it when closing your tab.”

### Customer instructions:

- Keep card safe
- Show card when ordering at either bar
- Return card when ready to close tab
- If they lose it, come find us

### What good looks like:

- Customer has TAB card
  - Customer understands they need to keep it
  - They know to show it when ordering
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## STEP 6: Open Tab in POS

### How to open tab:

1. **Open POS**
2. **Tap: Menu**
3. **Tap: Tables**
4. **Tap: Bar Tab**
5. **Visual canvas appears** showing all tables T001-T024
6. **Find the matching table number** (e.g., T007)
  - Should show **GREY** (not in use)
7. **Tap the table number once**
8. **Enter number of people** (customer party size)

- Example: Customer alone = 1, Couple = 2, Group = however many

## 9. Tap: Save

### What good looks like:

- Table now shows **GREEN** (open, no orders yet)
- Table number matches TAB card given to customer
- Party size entered

### If table shows RED or ORANGE instead of GREY:

- Someone didn't close this tab properly last time
  - Tell manager immediately
  - Use different tab number
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# STEP 7: Take Initial Order

## Now take and serve their first order:

1. Ask: "What can I get you to start?"
2. Add drinks to the order on POS
3. Hit **Save**
4. Make/collect drinks
5. Serve customer

## The tab is now active and ready for them to use all night

### What good looks like:

- Customer has drinks
  - Customer has TAB card
  - Tab shows RED in POS (has unpaid orders)
  - Credit card secured in matching slot
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# ADDING TO AN EXISTING TAB (Step-by-Step)

## Customer Returns to Order

### Customer approaches bar and shows TAB card

## You say:

“What can I get you?”

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# STEP 1: Open Tab in POS

## How to do it:

1. **Open POS**
2. **Tap: Menu**
3. **Tap: Tables**
4. **Tap: Bar Tab**
5. **Find the matching table number** from customer's TAB card
  - Example: Customer shows T007 → find T007 on screen
  - Should show **RED** (unpaid orders) or **GREEN** (open but empty)
6. **Tap the table number once**
7. **Table opens** showing any existing orders

## What good looks like:

- Correct table opens
- You can see previous orders (if any)
- Ready to add new drinks

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# STEP 2: Add Drinks to Order

## How to do it:

1. Take customer's order verbally
2. Add products to POS (same as normal order process)
3. Products appear in order list
4. Review with customer if needed

## You can add drinks from either bar:

- Customer opens tab at Speakeasy bar
- Later orders from Live bar
- Both bars access same POS system
- All drinks go on same tab

## What good looks like:

- All drinks added correctly
  - Quantities correct
  - Special requests noted (if any)
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## STEP 3: Save Order

### How to do it:

1. **Tap: Save button**
2. Order is now added to tab
3. Table status updates to **RED** (unpaid orders)

### What happens:

- Order saved to tab
- Running total increases
- No payment required yet
- No receipt prints (unless you manually print)

### What good looks like:

- Order saved successfully
  - You can see updated total (if you tap Total button)
  - Ready to make drinks
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## STEP 4: Serve Drinks

### Make or collect drinks and serve customer:

“Here you go! Just show your TAB card when you want to order again.”

**Customer continues to hold TAB card until they're ready to close tab**

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## CLOSING A TAB (Step-by-Step)

### STEP 1: Customer Requests to Close Tab

### Customer says:

“Can I close my tab please?”

### You respond:

“Sure! Can I have your TAB card?”

### Customer must return TAB card to you

- They cannot close tab without returning card
  - This is how you know which tab to close
  - They cannot keep card as souvenir (they won't get credit card back)
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## STEP 2: Open Tab and Print Bill

### How to do it:

1. **Look at TAB card number** (e.g., T007)
2. **Open POS**
3. **Tap: Menu**
4. **Tap: Tables**
5. **Tap: Bar Tab**
6. **Find matching table number** (T007)
  - Should show **RED** (unpaid orders)
7. **Tap the table number once**
8. **Table opens** showing all orders
9. **Tap: Total** (bottom of screen)
10. **Payment screen appears** showing full total
11. **Tap: Print**

### What happens:

- Receipt printer prints full itemized bill
- Table status changes to **ORANGE** (bill printed)
- Tab not closed yet - waiting for payment

### What good looks like:

- Receipt prints successfully
- Shows all drinks ordered

- Shows total amount due
  - Customer can review it
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## STEP 3: Retrieve Credit Card from Holder

### How to do it:

1. Look at TAB card number customer returned (e.g., T007)
2. Go to TAB book holder
3. Find matching numbered slot (T007)
4. Remove credit card from that slot
5. Keep TAB card in your hand (don't put it back yet)

### CRITICAL:

- Get card from CORRECT slot matching TAB card number
- If you mix this up, you give wrong card to wrong customer

### What good looks like:

- Credit card retrieved from correct slot
  - Slot now empty
  - TAB card still in your hand
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## STEP 4: Show Bill to Customer

### Present printed bill:

“Here's your bill - total is [amount] baht. Please review it and let me know if everything looks correct.”

### Give customer time to review:

- Check all drinks are correct
- Check quantities
- Check prices
- Check total

### If customer disputes something:

- See "Troubleshooting: Customer Disputes Bill" section below

- Don't argue - get manager

**If customer confirms it's correct:**

“Great! How would you like to pay today?”

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## STEP 5: Process Payment

**Three payment options:**

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### OPTION A: Credit Card (Original Card or Different Card)

**Customer can pay with:**

- The credit card you're holding OR
- A different credit card

**How to do it:**

1. Take credit card (theirs or different one)
2. Insert or tap card on EDC machine
3. Wait for approval
4. Receipt prints from EDC
5. Tab automatically closes in POS
6. Give customer their credit card(s) and receipt

**What good looks like:**

- Card approved
  - Receipt prints
  - Tab closed (table returns to GREY)
  - Customer leaves with credit card
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### OPTION B: PromptPay QR

**Customer wants to pay via PromptPay:**

1. In POS payment screen, tap **PromptPay**
2. QR code generates
3. Customer scans and pays
4. Wait for "Payment Success" confirmation

5. Tab automatically closes
6. Give customer their credit card and receipt

**What good looks like:**

- Payment confirms quickly
  - Tab closes
  - Customer leaves with credit card
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## OPTION C: Cash

**Customer pays with cash:**

1. In POS payment screen, tap **Cash**
2. Customer gives you cash
3. Enter amount received
4. POS calculates change
5. Give customer change from till
6. Tab automatically closes
7. Give customer their credit card and receipt

**What good looks like:**

- Correct change given
  - Tab closes
  - Customer leaves with credit card
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## OPTION D: Split Payment

**Customer wants to split payment** (Example: "I'll pay 500 baht, my friend will pay the rest")

**How to do it:**

1. In payment screen, tap **Split** button
2. Enter first amount (500 baht)
3. Process first payment (PromptPay/cash/card)
4. POS automatically shows remaining balance
5. Process second payment
6. Tab closes when all payments complete

**What good looks like:**

- Each person pays their share
- Total matches bill
- Tab closes

- Everyone happy
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## STEP 6: Return Credit Card to Customer

### CRITICAL STEP - DON'T FORGET THIS:

“Here's your credit card and receipt. Thank you!”

### Hand customer:

- Their credit card
- Printed receipt

### Common mistake: Forgetting to return credit card

- Customer leaves without card
  - You have to find them or they return next day
  - Creates confusion
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## STEP 7: Return TAB Card to Book

### Final step:

1. Take TAB card (still in your hand)
2. Go to TAB book holder
3. Find the matching numbered slot (should be empty now)
4. Place TAB card back in slot

### What good looks like:

- TAB card in correct slot
- Slot ready for next customer
- System complete

**Tab is now closed and ready to be used again**

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## TROUBLESHOOTING

# Problem: Customer Lost TAB Card

## What customer says:

“ I lost my TAB card / I can't find it”

## Fix:

1. Stay calm: "No problem, let me find your tab"
2. Ask customer's name
3. Go to TAB book - look through credit cards in slots
4. Match customer's name on credit card
5. Note the TAB card number from slot
6. You now know which tab to access

## Option A: Continue with same tab number

- Open that tab in POS
- Continue as normal
- When closing, they just tell you verbally which tab

## Option B: Move to new tab number (if card lost early in night)

1. Find new available TAB card
2. Open new tab in POS
3. Move existing orders to new tab (if possible) OR
4. Close old tab, open new tab with their credit card
5. Give them new TAB card

## What good looks like:

- Customer verified
- Tab accessible
- Customer can continue ordering

## What if someone finds lost card and tries to order:

- Our fault for not training customer to keep card safe
  - Still process orders (we have their credit card as guarantee)
  - Mention to customer when they return: "FYI someone found your card and ordered on your tab"
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# Problem: Customer Leaves Without Closing Tab (Walkout)

## How you know:

- End of night, closing down
- You're closing special tabs (staff drinks, promo, wastage)
- You notice TAB cards still with credit cards in slots
- You check POS - tabs show RED (unpaid)

**Who handles this:** Bar Manager or Supervisor only

## Procedure:

1. Verify tab is genuinely unpaid (check POS)
2. Print the bill
3. Get credit card from slot
4. **Process payment by tapping/inserting credit card**
5. If card approves: Close tab, print receipt, store receipt safely
6. If card declines: See next section

## Store receipt in case customer returns:

- Keep in folder/binder
- Customer might come back next day: "I forgot to close my tab!"
- You can show them receipt and explain we charged their card

## What good looks like:

- All tabs closed at end of night
- Credit cards returned (if customer returns) or stored securely
- Receipts kept for customer follow-up

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# Problem: Credit Card Declines at End of Night

## When this happens:

- Customer walked out without closing tab
- You try to charge their credit card
- Card declines (insufficient funds, card cancelled, etc.)

**Who handles this:** Bar Manager or Supervisor

## Procedure:

1. Try card 2-3 times (might be temporary issue)
2. If still declines, check if customer is known regular
3. **If known customer:**
  - Store credit card safely
  - Contact customer next day: "Your card declined, please come settle your tab"
  - Most regulars will return and pay
4. **If unknown customer:**
  - Document incident: Date, tab number, total amount, card details (photo)
  - Report to manager/Eddie
  - Consider police report if amount is large
  - Flag customer (don't allow tab in future)

#### **What good looks like:**

- Incident documented
- Manager aware
- Follow-up plan in place

#### **Prevention:**

- This is WHY we take credit cards (not debit)
- Credit cards have higher limits
- Most credit cards won't decline

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## Problem: Customer Disputes Bill

#### **What customer says:**

“ "I didn't order this" or "This price is wrong" or "This total is too high"

#### **Fix:**

1. **Stay calm and polite:** "Let me check that for you"
2. **Show them printed bill** - review each item together
3. **Show them POS screen** - itemized list with timestamps
4. **If they're right** (genuine mistake):
  - "You're absolutely right, let me fix that"
  - Remove incorrect item: In POS, find item, tap Remove
  - Recalculate total
  - Reprint bill
5. **If they're wrong** (trying to dispute valid charges):
  - "This is what we have recorded across both bars"
  - Stay firm but polite

- Get manager if customer pushes back

**Who handles disputes:** Manager or Supervisor

- Don't argue with customer
- Don't make accusations
- Get manager to mediate

**Removing items from bill:**

- Manager approval required for items over [set threshold - ask Fai]
- Document reason for removal
- Reprint bill for customer to confirm

**What good looks like:**

- Issue resolved calmly
- Customer satisfied (or understands)
- Manager involved if needed

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## Problem: Customer Wants to Keep TAB Card as Souvenir

**What customer says:**

“ "Can I keep this card? It's cool!" or "Can I buy this?"

**Fix:**

“ "Sorry, we need it back for our system. But you're welcome to take a photo of it!"

**Why they can't keep it:**

- We only have 24 cards
- Need them for other customers
- They're part of our operating system

**If customer insists:**

- Get manager
- Offer alternative: Photo, or mention we sell merch at bar

#### What good looks like:

- Customer understands
  - They take photo instead
  - Card returned to system
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## Problem: Tab Card Damaged or Wet

#### What customer returns:

“ Card is bent, ripped, covered in beer, etc.

#### Fix:

1. Accept damaged card
2. Note the number
3. Close tab as normal
4. After customer leaves: Assess damage
5. **If still usable:** Wipe clean, return to slot
6. **If destroyed:**
  - Remove from system
  - Tell manager (need to order replacement)
  - Print new number sticker when card arrives
  - We now have 23 cards instead of 24 (note in logbook)

#### What good looks like:

- Tab closes successfully despite damage
  - Card replaced if needed
  - System continues working
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## Problem: Multiple People Sharing One Tab

#### What customer says:

“ "We're sharing this tab" or "Add this to our group tab"

**Fix: Allowed - as long as we have ONE credit card:**

1. Multiple people can order using same TAB card
2. They show card when ordering at either bar
3. One person's credit card is held
4. When closing tab, they can split payment if wanted
5. Credit card returned to person who opened tab

**How to split payment at end:**

- See "Closing Tab > Step 5 > Option D: Split Payment"
- Each person pays their share
- Or they settle up between themselves outside venue

**What good looks like:**

- Clear communication about whose card is held
- Group knows they're all on same tab
- Payment splits easily at end

**What if group wants multiple separate tabs:**

- "No problem, we can do that"
- Each person needs their own credit card
- Each person gets own TAB card
- Each person orders independently

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## Problem: All 24 Tabs Are In Use

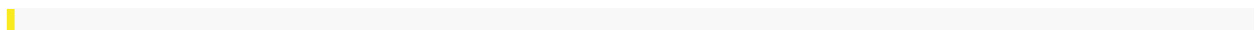
**What you see:**

- Customer wants to open tab
- You look at TAB book
- All slots have credit cards (no TAB cards available)

**How to check:**

- Look at POS Bar Tab screen
- All 24 tables showing color (not grey)

**Fix:**



"Sorry, all our tabs are currently in use right now. You can pay per order with PromptPay or cash, or wait a few minutes and I'll let you know when one becomes available."

#### **Most customers will:**

- Accept paying per order OR
- Wait for someone to close tab

#### **Very rare scenario:**

- Usually only 1-2 tabs active at a time
- Maximum we've seen is maybe 5-6 tabs
- If you hit 24 tabs, venue is VERY busy (good problem to have)

#### **Tell manager:**

- "We're running out of tab capacity"
- Manager may decide to order more TAB cards
- Or implement priority system (regulars first)

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## Problem: Customer Presents Debit Card at Opening

#### **What customer says:**

“ "Here's my card" (and it's a debit card)

#### **Fix:**

“ "Sorry, we only accept credit cards for tabs because we need to be able to charge the card if you forget to close your tab. Debit cards require a PIN which you won't be here to enter. Do you have a credit card instead?"

#### **If customer doesn't have credit card:**

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"No problem! You can pay for each order with PromptPay or cash instead."

### **Why we refuse debit cards:**

- Need PIN to charge (customer won't be present)
- Debit cards often have low/no balance
- Can't guarantee payment
- Creates problems at end of night

### **What good looks like:**

- Policy explained clearly
  - Customer understands
  - Alternative offered (pay per order)
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## **Problem: Foreign Credit Card**

### **Customer presents card from another country:**

#### **Fix:**

- **Accept it normally** (no special rules)
- Must still be credit card (not debit)
- Must not be expired
- Same procedure as Thai card

### **May have higher decline rate:**

- Foreign transaction fees
- Card issuer may block transaction
- If declines at end of night, follow standard walkout procedure

### **What good looks like:**

- Card accepted
  - Tab opens normally
  - Customer aware we hold their card
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## **Problem: Card Expiry Check**

### **When opening tab, card is expired:**

## Fix:

“Sorry, this card expired in [month/year]. Do you have a different credit card?”

### Why we check expiry:

- Expired cards won't process payment
- Protects us from walkouts
- Professional standard

### When to check:

- ALWAYS check when customer opens tab
- Look at front of card: expiry date bottom right usually
- Format: MM/YY (e.g., 06/24 = expired, 06/26 = valid)

### What good looks like:

- Card checked before accepting
- Only valid cards held
- Prevents end-of-night issues

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# INTEGRATION WITH OTHER SYSTEMS

## Using Tab with Table Service

### Customer opens tab at bar, then sits at table:

#### When table service staff approaches:

1. Customer shows TAB card
2. Staff opens tab in POS (Menu > Tables > Bar Tab > select table)
3. Add drinks to tab
4. Hit Save
5. Deliver drinks

#### All drinks from table service go on same tab

- No separate payment needed

- Customer closes tab at bar when leaving
  - See "Table Service Procedure" SOP for full details
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## Tab Across Both Bars

### **Customer opens tab at Speakeasy bar:**

- Credit card stored at Speakeasy
- Customer has TAB card

### **Customer orders at Live bar:**

- Shows TAB card to Live bar staff
- Live bar staff opens tab in POS (same system)
- Adds drinks to same tab
- All drinks accumulate on one tab

### **When closing:**

- Customer returns to either bar
- Staff can close tab from either POS
- Credit card retrieved from Speakeasy holder

### **What good looks like:**

- Seamless experience across both bars
  - One tab, one payment
  - Customer doesn't have to remember which bar they opened at
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## Staff Drinks Tab (Separate System)

### **Staff have their own tab:**

- Not T001-T024 customer tabs
- Separate "Staff Drinks" table in POS
- Also appears on Bar Tab screen

### **Staff do NOT use TAB cards:**

- Staff add their own drinks
- Settled at end of shift or month
- No credit card required

### **Why separate:**

- Prevents confusion with customer tabs
- Easier accounting (staff drinks tracked separately)
- Different payment/settlement process

**What good looks like:**

- Staff drinks clearly separate
  - Customer tabs never mixed with staff drinks
  - Clear tracking for both
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# END OF NIGHT PROCEDURES

## Closing Down the Bar

**Before leaving:**

1. Check POS Bar Tab screen
2. Verify all tabs are closed (all tables show GREY)
3. Check TAB book - all slots should have TAB cards (not credit cards)
4. If any tabs still open, follow walkout procedure

**Who does this:** Person closing shift (usually Bar Manager)

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## Reconciling Tabs

**What to check:**

1. TAB book matches POS screen
2. All TAB cards accounted for (should have all 24)
3. No credit cards left in slots
4. Any walkout receipts documented and stored

**If TAB card missing:**

- Check floor (might have fallen)
- Check customer left-behind items
- Document missing card
- Tell manager next day
- Continue with 23 cards until replacement arrives

**What good looks like:**

- All tabs closed
  - All TAB cards in book
  - No credit cards held overnight
  - System ready for next day
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# Walkout Documentation

## If you had to charge credit cards for walkouts:

### Document:

- Date and time
- Tab number
- Total amount charged
- Customer name (from credit card)
- Receipt printed and stored

### Store receipts:

- Folder or binder at bar
- Keep for 7 days (customer might return)
- "I forgot to close my tab last night!"

### What good looks like:

- All walkouts documented
  - Receipts organized
  - Manager aware of any issues
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# TIPS FOR EFFICIENT TAB MANAGEMENT

## Speed Tips

### Opening tabs faster:

- Memorize POS navigation (Menu > Tables > Bar Tab)
- Check card type and expiry in one glance
- Have TAB book positioned for easy access

### **Adding to tabs faster:**

- Customer shows card immediately when ordering
- Quick visual identification of table number in POS
- Add drinks while chatting with customer

### **Closing tabs faster:**

- Print bill while customer finishes last drink
  - Have credit card ready before asking payment method
  - Process payment quickly
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## Customer Service Tips

### **Suggest tabs proactively:**

- Customer ordering second round: "Would you like to open a tab? Saves paying each time."
- Group arriving: "Are you staying for the show? I can set up a tab for you."
- Regular customers: "Want your usual tab?"

### **Communication:**

- Explain system clearly to first-timers
- "Just show this card when you want to order"
- "Come find me when you're ready to close"

### **Make it easy:**

- Keep TAB cards visible so customers remember to show them
  - Check in with tab customers periodically: "Everything going well with your tab?"
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## Preventing Problems

### **Double-check credit card slot:**

- Match TAB card number to slot EVERY TIME
- Mixing these up is the biggest preventable mistake

### **Check expiry dates:**

- ALWAYS check when opening tab
- Saves problems at closing time

### **Return credit cards:**

- Make this a habit: close tab → return card IMMEDIATELY
- Don't serve next customer before returning card

### **Watch for debit cards:**

- Train yourself to spot them quickly
  - "DEBIT" usually visible on card front
- 

# TRAINING NOTES FOR NEW STAFF

## First Time Opening Tab

### **Before shift:**

- Manager shows you TAB book location
- Practice identifying credit vs debit cards
- Practice POS navigation (Menu > Tables > Bar Tab)
- Walk through one complete tab cycle

### **During shift:**

- Shadow experienced staff first tab
- They watch you do second tab
- You do third tab independently

### **After shift:**

- Review: What went well? What was confusing?
- 

## Common Beginner Mistakes

### **Mistake #1: Accepting debit cards**

- **Why it's bad:** Can't charge card at end of night, risk of walkout
- **Fix:** Always ask "Is this credit or debit?" before accepting

### **Mistake #2: Forgetting to return credit card**

- **Why it's bad:** Customer leaves without card, has to return next day
- **Fix:** Make it a ritual: close tab → return card → THEN move to next task

### **Mistake #3: Mixing up credit card slots**

- **Why it's bad:** Wrong customer gets wrong card = serious problem
- **Fix:** Double-check tab number matches slot number EVERY TIME

### **Mistake #4: Not checking expiry dates**

- **Why it's bad:** Card declines at closing time, causes delay
- **Fix:** Check expiry when opening tab, before storing card

### **Mistake #5: Forgetting to give customer TAB card**

- **Why it's bad:** Customer can't order at other bar, gets confused
  - **Fix:** Open tab → give TAB card → THEN take first order
- 

## How Long to Learn

**Basic competency:** 5 minutes instruction + 3 supervised attempts **Full confidence:** 5-10 tabs over 2-3 shifts **Expert level:** 20+ tabs

**It's easy once you understand the flow** - don't stress if first few attempts feel slow

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# SECURITY & FRAUD PREVENTION

## Preventing Staff Fraud

### **Staff drinks tab:**

- Staff use separate tab (not T001-T024)
- Tracked separately in POS
- Manager reviews staff drinks regularly

### **POS tracking:**

- All actions logged with staff member name
- Manager can audit who opened/closed tabs
- CCTV covers POS area

### **Cash handling:**

- All cash payments tracked in POS
- Cash drawer counts at shift change

- Manager reconciles daily

### **What good looks like:**

- Clear separation between customer tabs and staff drinks
  - Full audit trail
  - No unexplained discrepancies
- 

## Preventing Customer Fraud

### **Credit card verification:**

- **(Best practice)** Check ID matches card name when opening tab
- We don't currently do this for regulars but should for unknowns
- Prevents stolen card usage

### **Signature check:**

- When customer pays with credit card, receipt includes signature
- We don't currently verify signature but could add this
- Extra protection against fraud

### **Card storage security:**

- Cards stored in non-visible location
- CCTV coverage
- Only bar staff access

### **What good looks like:**

- Cards secure
  - Known customers trusted
  - Unknown customers verified
- 

## Lost Credit Card Liability

### **If customer's credit card goes missing from our storage:**

- **Never happened yet** but important to plan for
- Venue likely liable (we accepted responsibility for card)
- Immediate steps:
  1. Check all slots thoroughly (might be misplaced)
  2. Check CCTV footage

3. Tell manager immediately
4. Inform customer
5. Document incident
6. Customer should cancel card with bank

**Prevention:**

- Secure storage location
  - Only bar staff access TAB book
  - CCTV coverage
  - Regular audits (no random credit cards left over)
- 

## COMMON QUESTIONS

"Can I open tab with my friend's credit card?"

**Answer:**

“Sure, as long as they're here to authorize it. The card holder needs to be present when opening the tab.”

**Why:** Prevents stolen card usage

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"Can we have separate tabs?"

**Answer:**

“Yes! Each of you will need your own credit card, and you'll each get a TAB card.”

**Process:** Open multiple tabs, one for each person

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"Can I add my friend's drinks to my tab?"

**Answer:**

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"Sure! Just show your TAB card when ordering for them."

**Process:** Add all drinks to one tab, split payment if needed at end

---

## "What if I lose my TAB card?"

**Answer:**

“No problem! Come find me and I'll look up your tab by your name on the credit card.”

**Process:** See "Troubleshooting: Customer Lost TAB Card"

---

## "Can I close my tab and open a new one?"

**Answer:**

“Of course! Let me close this one first, then we can open a fresh tab.”

**Why someone might want this:**

- Split night with different groups
- First tab was for dinner, new tab for drinks
- Wants to clear previous total from mind

**Process:** Close tab normally, then open new tab

---

## "I forgot to close my tab last night"

**Answer:**

“No problem! Let me check if we closed it for you.”

**Process:**

- Check walkout receipts
- If we charged their card: Show receipt, explain we secured payment
- If we didn't charge (card declined): Ask them to settle now
- Return credit card if we still have it

**What good looks like:**

- Customer relieved we handled it
- Payment settled
- Credit card returned

# VERSION CONTROL

Version	Date	Updated By	What Changed
1.0	30/12/2024	Aaron	Initial creation

**Last Reviewed:** 30/12/2024

**Next Review Due:** 30/03/2025 (review every 3 months)

**Document Owner:** Fai (Bar Manager)

# EMERGENCY CONTACTS

Issue Type	Contact	Phone
Tab system technical issues	Kop	[Insert number]
Customer disputes	Fai / Manager	[Insert number]
Card declined / walkout	Bar Manager / Eddie	[Insert number]
Fraud / stolen card	Eddie / Police	[Insert number]
Emergency	Eddie	[Insert number]

# APPENDIX: VISUAL QUICK REFERENCE

# POS Color Code System

Color	Status	What It Means	Action Needed
GREY	Not in use	Tab available	Can open new tab
GREEN	Open, no orders	Tab active but empty	Ready for orders
RED	Unpaid orders	Tab has drinks on it	Normal - customer still drinking
ORANGE	Bill printed	Ready to close	Process payment

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## Tab Opening Checklist

- Customer requests tab
  - Check card is **CREDIT** (not debit)
  - Check card **NOT EXPIRED**
  - Find available TAB card in book
  - Store credit card in matching slot
  - Give TAB card to customer
  - Open table in POS (Menu > Tables > Bar Tab > tap table)
  - Enter party size
  - Save
  - Take initial order
- 

## Tab Closing Checklist

- Customer returns TAB card
  - Open tab in POS
  - Tap Total
  - Tap Print
  - Get credit card from matching slot
  - Show printed bill to customer
  - Ask payment method
  - Process payment
  - Return credit card to customer (DON'T FORGET!)**
  - Return TAB card to book slot
- 

## End of Night Checklist

- All tabs closed (POS shows all GREY)
- TAB book has all 24 cards (no credit cards left)

- Any walkout receipts documented
  - TAB book stored securely
  - Any issues reported to manager
- 

## **END OF TAB SYSTEM WORKFLOW SOP**

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Revision #1

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