

Heartland

Restaurant

Bar Tabs User Guide
for Mobile 2.0 and NextGen

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Date	Product Version	Author	Summary
08/06/2024	9.46	JWD	Original document introduced.
09/19/2024	9.56	JWD	Added section on “Using Bar Tabs with NextGen POS and Verifone T650 P or T650 C”

Overview

This article describes how to configure a Heartland Restaurant location to use bar tabs, also called pre-authorizations and incremental authorizations, for credit card transactions.

Pre-authorizations allow a location to capture a pre-authorized payment and then keep that card on file until the payment is finalized. An *incremental authorization* is an optional feature that can help restaurants manage bar tabs that exceed their pre-authorized amounts. Incremental authorizations ensure that a credit card has enough money to cover the bill as the customer adds more menu items to their tab.

Bar Tab Prerequisites

Using Bar Tabs with Mobile 2.0

POS minimum version: 2.12.446 JS v290

Pay App minimum version: 2.18e using Restaurant POS Template

Required Pay App Template Settings:

- ▶ IncrementalAuthSupported: Enabled
- ▶ Settle with open auths: Enabled
- ▶ PreAuthDeleteOption: Enabled
- ▶ Pre Auth Days Limit: 2

Using Bar Tabs with NextGen POS and Heartland Reader

POS minimum version: 2.12.446 JS v290

Heartland Reader minimum firmware version: 14.03-10.5.23

Using Bar Tabs with NextGen POS and Verifone T650 P or T650 C

POS minimum version: 2.16 APK

Pay App minimum version: 2.18G using Restaurant POS Template

Required Pay App Template Settings:

- ▶ IncrementalAuthSupported: Enabled
- ▶ Settle with open auths: Enabled
- ▶ PreAuthDeleteOption: Enabled
- ▶ Pre Auth Days Limit: 2

Configuring the POS to Use Bar Tabs

We recommend all Heartland Restaurant POS locations use incremental authorizations to ensure that each credit card on file has enough funding to cover its cardholder's bill as it increases. To use pre-authorizations and incremental authorizations, you must configure the settings of the room in which those tabs will be processed, such as a bar.

- 1 In the Admin Console's Main Menu, click **Location Setup**, then click **Rooms**.
- 2 In the Rooms screen, select a room that will use pre-authorized tabs (such as a bar).

The program will open the Settings panel for the room.

- 3 In the **Pre-Auth Amount** box, enter an appropriate amount for initial credit card pre-authorizations (such as \$10).

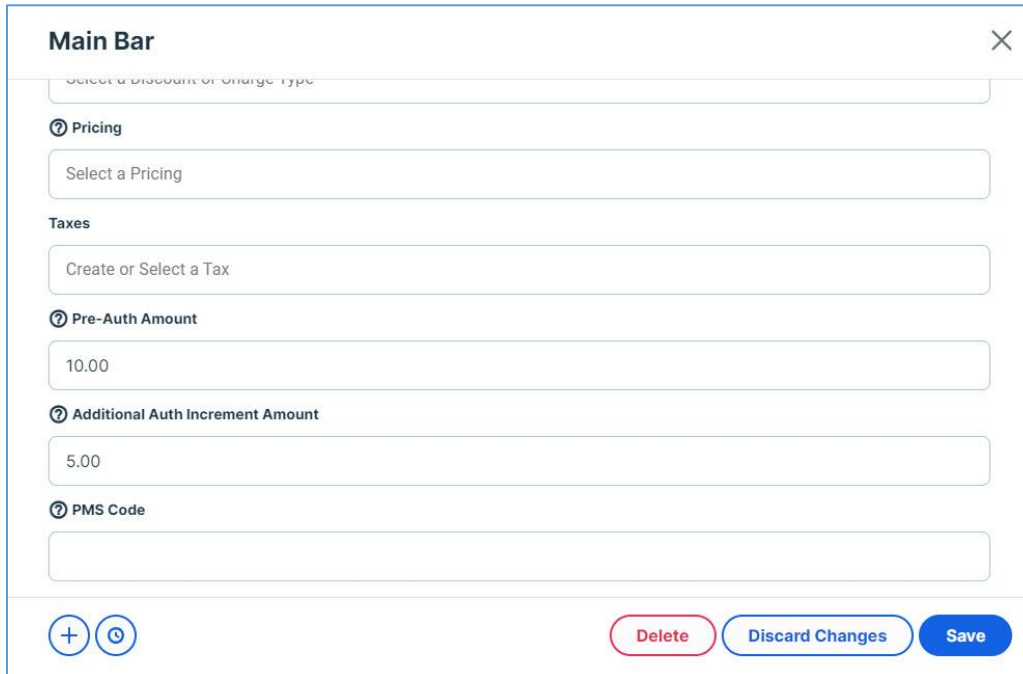
When a server opens a credit card tab for a customer, the POS will immediately pre-authorize the card for the amount you enter in this box. Later, when the tab is paid, the POS will authorize the card for its final amount, whether it is higher or lower than the pre-auth amount.

We recommend you set the pre-auth amount at the location's average check amount.

- 4 In the **Additional Auth Increment Amount** box, enter an appropriate amount for incremental increases to the initial pre-authorization amount (such as \$10).

When the pre-auth amount is exceeded, the POS will automatically pre-authorize the card again for this amount. For example, you might set the **Pre-Auth Amount** to \$10, and then set the **Additional Auth Increment Amount** to \$5. In the POS, when you open a new credit card tab, the POS will pre-authorize the card for \$10. If, after adding items to the ticket, the total exceeds \$10, the POS will then pre-authorize the card for an additional \$5, bringing the tab's pre-authorized maximum of \$15. And so on.

- 5 Click **Save**.



Main Bar [Close]

Select a discount or charge type

Pricing

Select a Pricing

Taxes

Create or Select a Tax

Pre-Auth Amount

10.00

Additional Auth Increment Amount

5.00

PMS Code

[+] [Refresh]

Delete Discard Changes Save

Configuring a Location to Use Tip Threshold Warnings

To use tip threshold warnings, you must set a tip threshold percentage amount in the location's settings.

- 1 In the Admin Console's Main Menu, click **Location Setup**.
- 2 In the Location Settings screen, click the **Transaction Settings** tab.
- 3 In the **Transaction Settings** tab, enter an appropriate tip threshold amount in the **Tip Threshold Warning Percentage** box.

☐ Swiping a credit card on the ticket info screen starts a tab.

⑦ Credit Card Drawer Pop

☒ The attached cash drawer will open when tendering to a credit card.

⑦ Credit Card Signature Minimum

10.00

⑦ Tip Threshold Warning Percentage

20

Refunds

☒ Enables cash and credit card refunds.

Allow Zero Tip Suggestion

☒ When enabled guests will be able to select a \$0.00 tip choice anywhere tip suggestions are available.

eGift QR Code

☒ Enable QR Code for eGift

Discard Changes Save

If you enter a percentage amount in this box, the POS will display an alert message whenever a tip is applied that exceeds this percentage amount of its ticket.

4 Click Save.

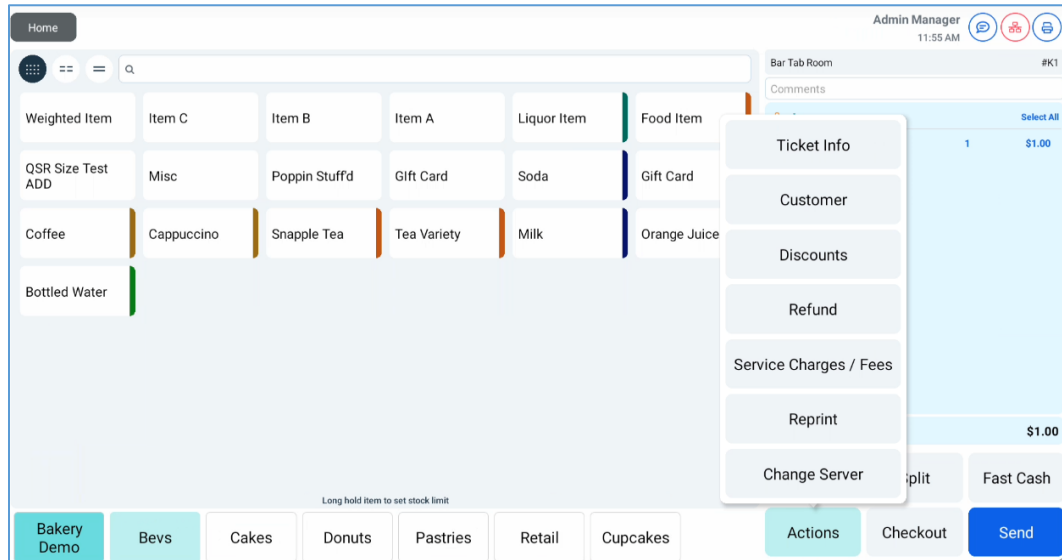
Typically, you should enter the percentage of the tip overage amount as defined by the location's card processor.

If you do not enter an amount in the **Tip Threshold Warning Percentage** box, the POS will not display any tip threshold alerts.

Managing Bar Tabs in the NextGen POS

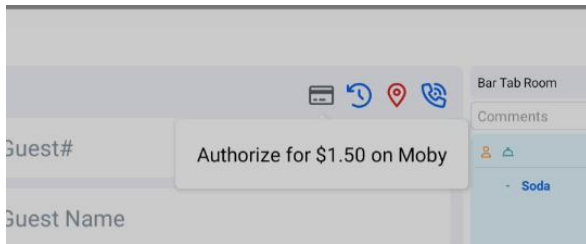
The following procedures describe how to open and preauthorize a typical bar tab in NextGen POS.

- 1 In the POS Rooms screen, select a room that uses bar service.
- 2 Tap **Add Ticket**.
- 3 In the Order screen, in the Ticket panel, tap **Actions**.
- 4 In the **Actions** menu, tap **Customer**.



- 5 Tap the **Credit Card** icon in the top panel of the Customer screen.

The POS will display an option to pre-authorize the card for a preset amount.



- 6 Tap the **Authorize for...** option.

The payment device will activate.

- 7 Dip, swipe, or scan the card.

Once approved, the POS applies the pre-authorization to the ticket. You can now order additional menu items or otherwise modify the ticket. Should the ticket's total exceed its pre-auth amount, the POS will try to add an incremental authorization for the amount specified in the room's settings.

- 8 When you are ready to close the ticket, tap **Checkout**.
- 9 Tap **Card**, then tap the available card token option.

The POS will verify the card for the ticket's current total.

10 Add a tip amount to the ticket before closing it.

To process charges for bar tabs properly, the POS **requires** each of them to have a tip amount before batch processing. Even if the tip amount is "\$0.00", each ticket **must** have a selected tip amount. Otherwise, the location may not receive payment for the ticket.

Therefore, if a customer does not add a tip to a ticket, the location's staff must do so, either individually in the ticket's ordering screen, or as part of a group of tickets edited with the bulk tip editing utility in the Daily Review screen.

New Authorization Lifecycle for Bar Tabs

Heartland Restaurant now includes the following actions in its bar tab protocol to reduce the likelihood of chargebacks:

- ▶ The POS verifies the card's funds for the tab's final subtotal (before a tip is added) and automatically increments the initial authorization.
- ▶ The POS verifies the card's funds again after a tip is added and automatically increments the initial authorization again.
- ▶ The POS displays an alert when the tip is over a configurable tip threshold percentage amount.

In a bar service environment using pre-authorizations and incremental authorizations, a typical bar tab now features the following lifecycle, based on a pre-authorized amount set as \$10 and an incremental authorization amount set as \$5:

Customer Starts Tab

Swipe the card	POS pre-authorizes for initial amount (\$10)
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Customer Orders New Items

Initial amount exceeded	POS adds incremental amount (\$5)
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Customer Orders New Items

Previous amount exceeded	POS adds incremental amount (\$5)
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Customer Pays Tab

POS verifies card funds	POS authorizes for tab's Subtotal
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Customer Adds Tip

POS verifies card funds	Authorizes for tab's Total (Subtotal + Tip)
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“Credit Add to Batch”

POS adds finalized transaction to credit card batch.