

Untappd

For an Untappd integration, the client must understand that by integrating GoTab with Untappd that all future beer menu changes and management will occur through the Untappd management interface.

INFORMATION REQUIRED

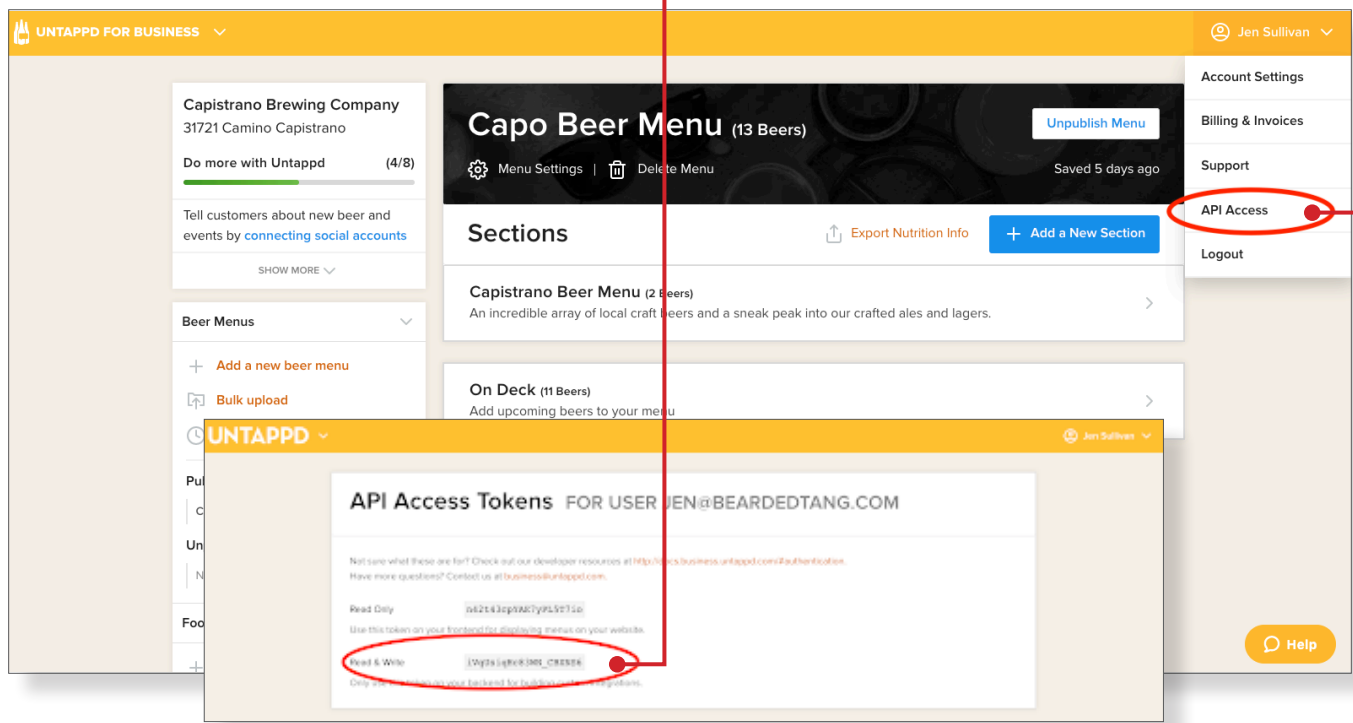
- API Key
- Username
- Password

FOR SUCCESSFUL INTEGRATION:

- All beer items must be populated with pricing information to import data successfully.
- Import either all menus or one menu. This constraint means that their beer menu must be tidy and ready to be imported. In most cases, all menus are imported.
- The "On Deck" menu is not importable.

RECOMMENDED PROCESS:

1. Get Username and Password for Untappd account.
2. Visit <https://business.untappd.com/> and login with the given credentials.
3. In the upper right corner use the hamburger menu to reach the "API Access" menu.
4. Copy the "Read & Write" API Key.



901 N Stuart St, Arlington, VA 22203 • (202) 949-6886 • info@gotab.io

<https://gotab.io/en/>

7Shifts

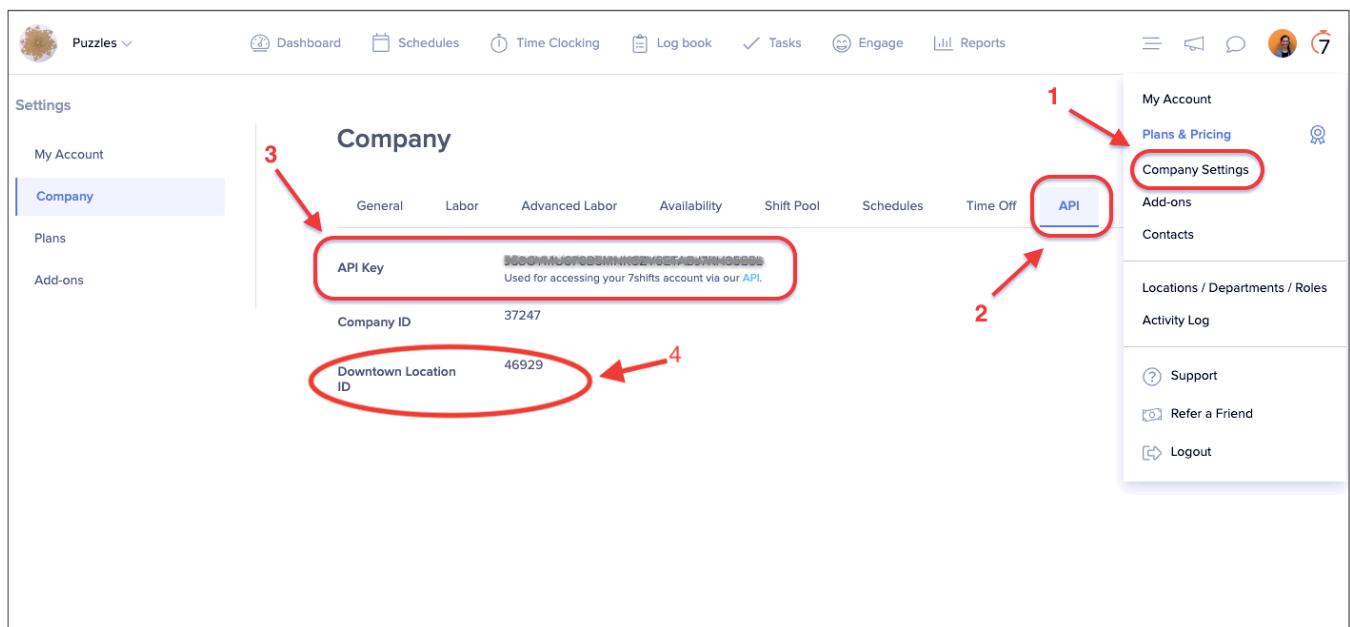
7Shifts enables GoTab sales data to be viewed against labor tracking information in 7Shifts. The information can be easily provided by the account holder.

INFORMATION REQUIRED

- API Key
- 7Shifts Location ID

RECOMMENDED PROCESS:

1. Send the image below to the contact with 7Shifts login credentials, for them to complete the following steps.
2. In the menu on the top right, click the "Company Settings".
3. Click the "API" tab on the right side.
4. Copy the API Key.
5. Copy the location ID. (If the account has multiple locations, make sure to get the location ID related to the location implementing GoTab.)



Quickbooks

This is an easy integration. You must allow at least one user on the management page to have the accounting permissions. Only users with permission will be allowed to export the Quick Books data.

INFORMATION REQUIRED

- **At least one user must be assigned to have accounting permissions to use the management page.**

FOR SUCCESSFUL INTEGRATION:

- The photo below shows the section that will allow you to assign categories and items to the appropriate accounting revenue center.
- The customer should be directed to the QuickBooks configuration screen to complete this area themselves.

RECOMMENDED PROCESS:

1. On the Agents page on the management dashboard, click "Add Agent" and select "Quickbooks". Then in "acl" add "permission:accounting" with no quotes.
2. Once this is completed, click on the new Quickbooks agent and in the "Realm ID" box input the Realm ID from the customer.
3. To manage data from GoTab to Quickbooks, after completing the above integration, the "Configure Quickbooks" tab will appear at the top of the "Payouts" section of the manager dashboard.

The screenshot displays the 'Quickbooks Configuration' interface. On the left is a sidebar menu for 'Caboose Commons (1019)' with options like ORDERING, Status, GoTabs, Takeout / Delivery, Menu, Inventory, Schedule, Zones, QR Codes, and KDS. The main area is titled 'Quickbooks Configuration' and includes a 'Save Changes' button. Below this is a table with menu items and their corresponding accounting revenue centers:

Menu Item	Accounting Revenue Center
Bowls	Food Sales
Breakfast	Food Sales
Caboose Beer (Dine-In)	Caboose Draft Sales
Caboose Beer (Takeout Only)	Packaged Sales
Cocktails	Outside Liquor Sales
Cold Cafe Drinks*	Coffee Drink Sales
Community Donations	Food Donations
Hot Cafe Drinks*	Coffee Drink Sales

901 N Stuart St, Arlington, VA 22203 • (202) 949-6886 • info@gotab.io

<https://gotab.io/en/>

Omnivore

The 3rd party system we use for our integration is called Omnivore. There are a couple of prerequisites for the Omnivore installation, depending on your point of sale.

INFORMATION REQUIRED

- Engage member of the deployment team ASAP.
- The instructions below should be copied and pasted into an email directly to the customer.

FOR SUCCESSFUL INTEGRATION:

- **If you are using Micros 3700 or Oracle Symphony, a license for Transaction Services is required.** If you do not already have this, please reach out to your Oracle support rep to get this underway. Please note that the optional Micros Ordering Module extension is not supported by Omnivore. If you have this already, please let us know. Also note that only RES4 and RES5 versions of 3700 are supported, and versions 2.9+ and 18.x of Symphony are supported.
- **If you are using POSitouch, a license for the XML Ordering module is required.** If you do not already have this, please reach out to your local POSitouch reseller to get this underway. Please note that the following POSitouch models and versions are supported: POSitouch; MENUW and QuickMenu; Transaction+ and MidniteExpress, versions 5.36+, 6.36+, QuickMenu 2.6.7.12+.
- **Next, there are some firewall rules** that will need to be put in place to whitelist outbound traffic from the Omnivore agent to the Omnivore cloud services. The following subnets should be whitelisted for outbound TCP connections on port 443 for new, related, and established traffic.
34.239.145.112/28 34.216.110.112/28 34.241.204.208/28 13.228.64.144/28
- Once that's done, the next step is to **download the base agent on the POS server by clicking this invite link from a browser on that machine:** <https://connect.omnivore.io/invite/KBA8S6X2>.
- **If you are using POSitouch,** this can be run on either the POS Driver or the Back Office computer.
- **Once downloaded, the base agent will run the Omnivore account and location activation prompts,** and once you've gotten through it, you will have scheduled a time with the Omnivore support team to complete the full configuration. The final Omnivore configuration steps will be done via a remote screen share, so we'll just need someone in the store who can grant access using TeamViewer from the POS server. This is a joint session involving Omnivore, GoTab, and your team.



Omnivore *continued*

EITHER BEFORE OR AFTER THE OMNIVORE AGENT IS INSTALLED:

We'll need a few POS-specific configurations to be made by someone who has administrative access. Namely, the following: (These are all case-sensitive)

1. **Create a tender called GoTab.**
2. **Create an employee** with first name GoTab, last name GoTab, and check name GoTab. Our checks get created under this pseudo "user."
3. **Create an open priced menu item** called GoTab Open Item. Make sure it's configured to print on prep station tickets and display on your KDS, if you are using one. (If using POSitouch, make sure memo field is enabled.)
4. **Create a \$0 priced menu item** called GoTab Spot. Make sure it's configured to print on prep station tickets and display on your KDS, if you are using one. (If using POSitouch, make sure memo field is enabled.)
5. **Create a \$0 priced menu item** called GoTab Customer. Make sure it's configured to print on prep station tickets and display on your KDS, if you are using one. (If using POSitouch, make sure memo field is enabled.)
6. **Create an open priced modifier** called GoTab Open Mod. Make sure it's configured to print on prep station chits / display on KDS and is in a modifier group that is assigned to any products that you want to enable open text customizations on. (If using POSitouch, this should be set up as a memo cell type called GoTab Open Item, not a general multiplier.)
7. **Create an open dollar discount** called GoTab Open Discount. This is used to support promotional programs.
8. **Enable multiple checks per table.** This supports the use case of multiple guests within one party opening individual checks at the same table.