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**LAST UPDATED:**  
7/21/2023

# RECTRAC 3.1 Open Ticket - Linking a Credit Card to a Tab

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# RecTrac 3.1 Open Ticket - Linking a Credit Card to a Tab



## Linking a Credit Card to a Tab Overview

For Navy MWR bars and restaurants that are using RecTrac 3.1 Open Ticket Processing to run "tabs", normal procedure is to link a customers credit card to their tab in RecTrac. This is done in the event they walk off/leave without paying.

**Note:** A credit card can only be linked to an open ticket (tab) AFTER the ticket has been established. Not before. Clerks will open a new ticket (tab), add some items to it, then once they are back on the Open Ticket data grid, proceed with the following steps.

## How to Link a Credit Card to an Open Ticket (tab)

Step 1: From the Open Ticket data grid, highlight the open ticket (tab) and then click (or touch) the 'Add/Change CC Info' in the bottom right.

Table Name	Ticket#	User	Total	Items	Printed	Start Time	Receipt	Location	Covers	CC Mask
Jane Smith	220	HQ_JLUSSIER	\$ 20.75	4	(0) S...	22:01		18420 EU8113-LOC	0	
John Smith	219	HQ_JLUSSIER	\$ 24.75	4		22:00		18419 EU8113-LOC	0	

## RecTrac 3.1 Open Ticket - Linking a Credit Card to a Tab



### How to Link a Credit Card to an Open Ticket (tab) – cont.

Step 2: The following window will display.

The screenshot shows a software window titled "EPay Info Management - Credit Card". At the top, there are menu options: "Options", "Templates", "(0)", and "Refresh". Below this is a header for the data table: "Stored Credit Card Info for Daily - Internal Household". The table has columns for "Credit Card Holder", "Credit Card ...", "Credit Card Number", "Expiration Date", "Status", "Linked To H...", "Account ID", "Account Type", and "Unique ID". Each column has a dropdown arrow. The table is currently empty, with the text "No records were found." centered in the main area. At the bottom of the window, there is a toolbar with a checkbox labeled "Process Manual Entry" and several buttons: "Select", "Add Credit Card" (which is highlighted with a red box), "Change", "Delete", and "Close".

Click (touch) 'Add Credit Card'. The MX915 credit card reader will activate. Insert the customer's card. The reader will check to make sure the card is valid by processing a \$1 authorization and then immediately voiding it.

**Note:** If the customer's card is unable to be inserted/swiped, check the toggle 'Process Manual Entry' in the lower left and then click (touch) 'Add Credit Card'. This will make the MX915 credit card reader prompt for manual card entry.

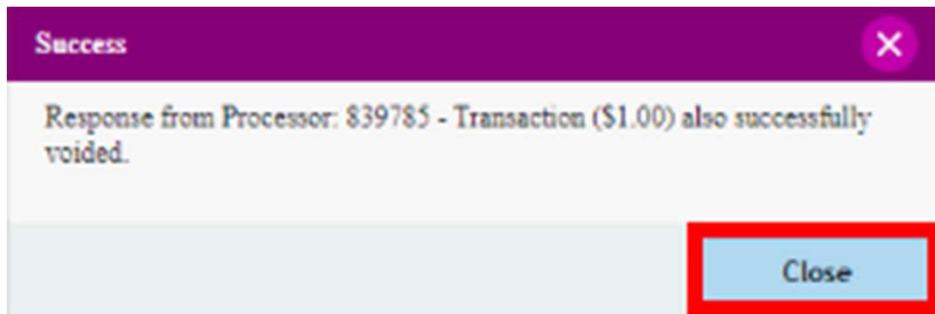
**Note:** The customer's card is NOT charged during this process; the auth/void for \$1 nets to zero and is just used to validate it's a real credit card.

## RecTrac 3.1 Open Ticket - Linking a Credit Card to a Tab



### How to Link a Credit Card to an Open Ticket (tab) – cont.

When the process on the MX915 card reader is complete, a message similar to the following will display. Click 'Close'.



Step 3: The following screen will display, showing the card that has been setup for linking to a ticket.

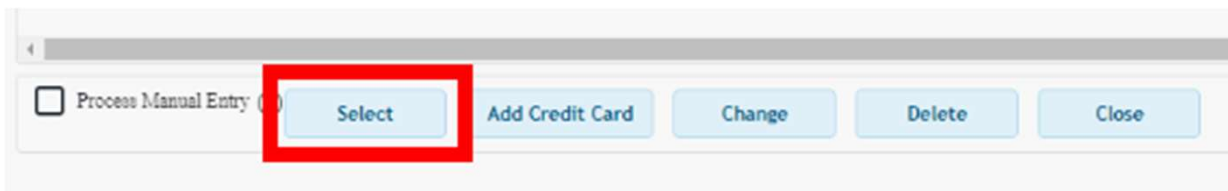
**Note:** The customers card is NOT linked to the open ticket (tab) YET.

EPay Info Management - Credit Card

Options Templates (1) Refresh Stored Credit Card Info for Daily - Internal Household

Credit Card Holder	Credit Card ...	Credit Card Number	Expiration Date	Status	Linked To H...	Account ID	Account Type	Unique ID
				(0) Selected	(0) Selected		(0) Selected	
				Active	<input type="checkbox"/>	LAB-NORMA...	Credit Card	213

Highlight the entry in the data grid and click (touch) 'Select' in the bottom left of the screen.



# RecTrac 3.1 Open Ticket - Linking a Credit Card to a Tab



## How to Link a Credit Card to an Open Ticket (tab) – cont.

You will be returned back to the Open Ticket listing in RecTrac. The CC mask column will now display the credit card mask of the card that is link to that open ticket (tab).

TouchScreen - No Household

Options Templates (0) Refresh

Open Tickets 1 to 2

Table Name	Ticket#	User	Total	Items	Printed	Start Time	Receipt	Location	Covers	CC Mask
<input type="checkbox"/> Jane Smith	220	HQ_JLUSSIER	\$ 20.75	4	<input checked="" type="checkbox"/>	22:01		18420 EU8113-LOC	0	
<input type="checkbox"/> John Smith	219	HQ_JLUSSIER	\$ 24.75	4	<input checked="" type="checkbox"/>	22:00		18419 EU8113-LOC	0	██████████

# RecTrac 3.1 Open Ticket - Linking a Credit Card to a Tab



## How to close out an Open Ticket (tab) to card on file

Now that a card is linked to an open ticket (tab), if the customer does walk off/leave, you can close out the open ticket (tab) to the card on file.

Step 1: Highlight the open ticket (tab) in question and click (touch) 'Closeout Ticket' at the bottom of the screen.

TouchScreen - No Household

Options Templates (1) Refresh

Open Tickets

Table Name	Tckt#	User	Total	Items	Printed	Start Time	Receipt	Location	Covers	CC Mask
▼	▼	0	▼ \$ 0.00	▼ 0	(0) S...	▼	▼	0	▼ 0	▼
<input type="checkbox"/> Jane Smith	220	HQ_JLUSSIER	\$ 20.75	4	<input checked="" type="checkbox"/>	22:01		18420 EU8113-LOC	0	
<input checked="" type="checkbox"/> John Smith	219	HQ_JLUSSIER	\$ 24.75	4	<input checked="" type="checkbox"/>	22:00		18419 EU8113-LOC	0	██████████

New User ⓘ  Reassign

New Ticket Update Ticket Quick Tab **Closeout Ticket** Order Print Print SubTotal Split Ticket Combine Tickets Void Tickets Add/Change CC Info Rem

## RecTrac 3.1 Open Ticket - Linking a Credit Card to a Tab



### How to close out an Open Ticket (tab) to card on file cont.

Step 2: From the Payment Screen, once the 'credit card' payment code is selected, click (touch) the drop down under 'Linked Credit Cards'. The card that was linked in the prior steps will display.

The screenshot shows the RecTrac payment interface. On the left, there is a table with columns for 'Account' and 'Amount'. The table contains the following data:

Account	Amount
0-10...	8.50
	2.25
003)	7.00
01)	7.00

The main form area contains the following fields and buttons:

- Total Due: \$ 24.75
- Total Paid: \$ 24.75
- Pay Code: 03 - Credit Card
- Linked Credit Cards: --- Not Selected ---
- Payment Reference 1: [Empty field]
- Payment Reference 2: [Empty field]
- Buttons: Process (green), Add Split Payment (blue)

A red box highlights the 'Linked Credit Cards' dropdown menu, which is currently set to '--- Not Selected ---'.

Select that linked card and then click 'Process' to complete the sale using the card on file.

The screenshot shows the RecTrac payment interface, similar to the previous one. The 'Linked Credit Cards' dropdown menu is now set to '3 [Redacted]', indicating that a card has been selected. The 'Process' button is highlighted with a red box.

The table on the left now contains the following data:

Account	Amount
	8.50
	2.25
	7.00
	7.00

The main form area contains the following fields and buttons:

- Total Due: \$ 24.75
- Total Paid: \$ 24.75
- Pay Code: 03 - Credit Card
- Linked Credit Cards: 3 [Redacted]
- Payment Reference 1: [Empty field]
- Payment Reference 2: [Empty field]
- Buttons: Process (green, highlighted), Add Split Payment (blue)