

Rex <> GoTab

Integration Mechanics & Limitations

Internal Reference Guide — GoTab Partnerships Team

1. High-Level Hook

“Turn Bookings into Active Tabs.” Bridge the gap between event reservation and guest service. This integration eliminates the manual re-entry of deposits and reservations, allowing guests to flow from “booked” to “ordering” without friction.

2. Integration Mechanics: What It Does

✓ Automated Tab Creation

- Trigger: When a staff member clicks “Check-in” within the Rex Host App.
- Action: A tab is automatically opened in the GoTab POS.
- Data Shared: Guest Name, Reservation Details, and Pre-paid Deposit amount.

✓ Tab Creation Timing — Two Workflow Options

Rex offers two workflows that determine when a tab is created in GoTab:

- Reservation Deposit Workflow: Creates one tab at the time of booking (for the deposit), then a second tab at check-in when the guest arrives. This is the most common setup.
- Paid In Full Workflow: Creates a single tab at the time of booking for the full amount. No second tab is created at check-in.

Important: Tabs are not open and visible in GoTab for days ahead of a reservation. In the Reservation Deposit workflow, the check-in tab only appears in GoTab at the moment the host clicks “Check In” — meaning kitchens and bars will not see the order on the KDS until the guest physically arrives.

✓ Deposit & Payment Forwarding

- Pre-payments: Deposits collected during the Rex booking process are transferred to the GoTab check as a credit/payment.
- The “Auto apply deposit to check-in tab” toggle controls whether the deposit is automatically applied as a payment on the check-in tab.

✓ Tax Configuration

Tax handling depends on how the integration is configured:

- By default, taxes are calculated inside GoTab once the tab is created. Rex sends the base package price; GoTab applies the local tax rules configured in the POS.
- The “Charge Taxes & Fees on Deposit” toggle (Reservation Deposit workflow only) can include tax in the deposit amount sent to GoTab.

Note: Do not configure tax rates in Rex expecting them to override GoTab’s tax settings unless this toggle is intentionally enabled.

✓ Product Mapping (Revenue Allocation)

- 1-to-1 Mapping: “Packages” in Rex (e.g., “VIP Lane Reservation”) are mapped to specific “Products” in GoTab (e.g., “Lane Rental SKU”).
- Reporting: Revenue is categorized correctly in GoTab’s backend (e.g., Event Revenue vs. F&B Revenue) based on this mapping.
- A Fallback Product and Fallback Spot can be configured for packages that don’t have their own explicit GoTab mapping.

✓ Customer Identification (Tab Claiming)

- Option to Force Tab Claiming: If turned on, forces the guest to associate their GoTab Profile to the booking, applying customer-identified discounts and segments according to GoTab built rules.
- Added Security: Associating purchases with GoTab profile adds verification layer to the purchase, better protecting from chargebacks and tracking order purchase history.
- If turned off, checkout is done anonymously through GoTab, making for a quicker checkout process.

3. Integration Boundaries: What It Does NOT Do

✗ It Does Not Open Tabs Before Arrival (Reservation Deposit Workflow)

- The Reality: A booking made on Tuesday for Friday night does not sit as an “Open Tab” in GoTab for three days.
- The Workflow: In the Reservation Deposit workflow, the check-in tab only exists in GoTab at the moment of Check-In (arrival). The Paid In Full workflow creates a tab at booking, but it is a payment/deposit tab — not a live ordering tab.
- Impact: Kitchens/Bars will not see the order on the KDS until the guest physically arrives and is checked in by the host.

✗ It Does Not “Push” Menu Changes

- The Reality: Creating a new “Burger & Beer Package” in Rex does not automatically create a “Burger & Beer” button in GoTab.
- The Workflow: You must create the item in GoTab first, then go into Rex and “Map” the package to that existing GoTab product UUID.
- Impact: Menu management requires a two-step setup (GoTab First → Rex Second).

✗ It Does Not Sync “Granular” Guest CRM History (Bi-Directional)

- The Reality: While the current visit is synced, Rex does not pull your entire historical GoTab spend history into the Rex profile, nor does GoTab pull every historical Rex booking note into the POS view.
- The Workflow: It shares the current reservation data and payment method.
- Impact: Marketing teams should use a separate data warehouse or CRM aggregator if they want a merged view of “Lifetime Value” across both systems.

✗ It Does Not Support Variable-Price Modifiers for Events

- The Reality: The integration cannot translate “Variable Price Modifiers” (add-ons that change the base price) as distinct line items in GoTab reporting.
- The Workflow: Instead of using one “Master Product” with multiple dropdown modifiers, you must create separate, distinct packages in Rex for every combination.

Example: Instead of one “Birthday Package” with three price options, build:

- Birthday Package (Soda Only)
- Birthday Package (Pizza & Soda)
- Birthday Package (Pizza & Beer)

Impact: Transparency is key — this limitation should be shared with prospects upfront. Present the “Unique Package” workflow as standard operating procedure for high-volume venues to ensure 100% accuracy in GoTab’s financial reporting.

✗ It Does Not Sync Membership Status*

- The Reality: Membership data, status, and associated discounts do not automatically sync between Rex and GoTab.

Workflows:

- GoTab-Lead Membership: To apply GoTab membership benefits to a Rex booking, the “Claim Tab” feature must be enabled. This forces the guest to link their GoTab profile during checkout, triggering their GoTab-stored benefits.
- Rex-Lead Membership: If a guest holds a Rex membership, discounts apply only to items in their Rex shopping cart. For in-house purchases, an operator must manually enroll the guest in a corresponding GoTab Membership Segment.

Impact: For venues offering both booking and in-house perks, centralizing memberships in GoTab is the most efficient “source of truth.”

**NOTE: Plans are in development to sync Rex Memberships with a corresponding GoTab Member segment in the future.*

Pro-Tip for Sales Conversations

When a prospect asks which system should “own” the membership, use this rule of thumb:

- **Choose GoTab** if the guest spends more money on-site (F&B, walk-in activities).
- **Choose Rex** if the guest primarily interacts with the brand through high-frequency online bookings.

✗ It Does Not Support Multi-Location on One Rex Account

- **The Reality:** Each individual GoTab location requires its own Rex account. One “Master” Rex account cannot push data to or pull from multiple GoTab location IDs.
- **The Workflow:** Operators managing multiple venues must create a unique Rex instance for each physical location, linking the specific GoTab Location ID and API Key to its corresponding Rex account.
- **Impact:** Corporate/regional managers will need to toggle between Rex accounts to manage different locations. Menu mapping and availability settings must be managed independently for every site.

4. Technical Requirements Checklist

Requirement	Detail
GoTab Location UUID	Must be provided to the Rex team and entered in Rex venue integration settings.
API Access ID & Secret	Set once at the GoTab account level in Rex Super Admin Settings — not per venue.
Deposit Product SKU	A specific product SKU must be created in GoTab dedicated solely to receiving deposits.
Common “Spot” Creation	A generic Spot (resource) must be created in GoTab to act as the placeholder for the reservation.
Get Products & Spots	After entering the Location ID in Rex, click “Get Products and Spot Lists” before selecting products/spots.

5. Example Flow

Step 1	Guest Books on Rex — Card Captured
Step 2	Data sits in Rex (Pending)
Step 3	Guest Arrives → Host clicks “Check In” on Rex App
Step 4	API Call → GoTab Opens Tab + Applies Deposit + Attaches Card
Step 5	Guest Orders F&B on GoTab (Added to same tab)
Step 6	Guest Closes Out — One single receipt for Event + F&B

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