



OWED

**\$162.84**

## SAMPLE REPORT · FICTIONAL DATA

ORDER

#482

DATE

Fri, May 29

OPENED

8:04 PM

FLOW

Walked tab

## ▶ ACTION

94% · OWN-DATA · SAFE TO CONTACT

**Call / text Jason M. → (214) 555-0188**

Matched via own-data — the same card is on file in your rewards history, even though it wasn't attached to this tab.

## ▶ SCRIPT — CALL OR TEXT THE GUEST

"Hi Jason, this is \_\_\_\_ from [your venue] — hope Friday was a great night! Quick heads up: when your tab came to \$162.84, the Visa ending 4421 didn't go through at close-out — no big deal at all. Can I grab a card over the phone, or would you like to drop in and have us re-run it?"

## ▶ PROOF

**Card**

VISA \*\*\*\*4421 (pre-authorized at open)

**Items**

2x Old Fashioned, Lagunitas IPA, Margarita, 2x Tito's Soda

**Arrived**

Fri, May 29, 8:04 PM

**Card declined**

Fri, May 29, 11:42 PM

**Tab closed**

Fri, May 29, 11:44 PM (open 220 min)

## ▶ IF THEY SAY "I ALREADY GOT CHARGED"

A separate order that night (a food check) **did** go through on the same card. This report is the **different, unpaid** bar tab that declined — "you had another transaction that worked; this one's the tab that didn't go through."

## ▶ OUTCOME (fill in)

☐ Paid \$\_\_\_\_\_ ☐ Promised ☐ No answer ☐ Left message ☐ Wrong number ☐ Refused

## ✓ PREVENTION CHECKLIST — MANAGER

- Tab was not linked to loyalty, but the guest is a rewards member (card on file). Attaching loyalty at open surfaces phone + email instantly.
- No phone number was captured on this tab.
- Card was pre-authorized to open the tab (valid at open) — the full charge declined at close.