

✓ POS Requirements Checklist

Before embarking on your quest to find a POS system, first make a comprehensive list of features and functions that best fit the needs of your restaurant. Here is a preliminary list to help you get started.



BASIC SYSTEM REQUIREMENTS

- ☐ Sold thru VAR (value-added reseller)
- ☐ Years in business - [Minimum = ____ years]
- ☐ Number of installations - [Minimum = ____ installations]
- ☐ Server Operating System - [WinXP, Server 2003, Linux, other]
- ☐ Workstation Operating System - [Windows 2000, XP, Windows CE, Linux, Mac, other]
- ☐ User friendly upgrade process
- ☐ Automatic data redundancy
- ☐ Redundancy method - [Alternate server, workstation data storage, other]
- ☐ Network/Communications platform - [Standard Ethernet-TCP/IP, other]
- ☐ Automatic data backup
- ☐ Data restoration procedure - [Documented, User - friendly]
- ☐ Proprietary hardware
- ☐ Non-proprietary hardware

SUPPORTED HARDWARE

- ☐ All-in-one touch screen workstation
- ☐ Cash drawers
- ☐ Guest check printer
- ☐ Customer price display
- ☐ Magnetic card swipe reader
- ☐ Biometrics (Fingerprint ID reader)
- ☐ Signature capture pad
- ☐ Order confirmation display
- ☐ Change dispenser
- ☐ Order requisition printer
- ☐ KDS (Kitchen Display System) integration
- ☐ MICR check reader
- ☐ Bar code scanner
- ☐ Integrated weight scale
- ☐ Handheld POS device

GENERAL SECURITY FEATURES

- ☐ Multiple security level access
- ☐ POS functions controlled by security level
- ☐ Fingerprint ID for manager/server log in functions
- ☐ Card swipe ID for manager/server log in functions
- ☐ Prevents unauthorized access to O/S
- ☐ Supports multiple cash drawers per POS terminal
- ☐ Compulsory cash drawer option
- ☐ Encrypted database
- ☐ Detailed transaction auditing
- ☐ Security access reporting option

GENERAL FEATURE REQUIREMENTS

- ☐ Touch-screen Functionality
- ☐ Configurable Order Screens (Table-service, QSR, Delivery, etc.)
- ☐ Table-service POS Functions
- ☐ Quick-service POS Functions
- ☐ Delivery POS Functions
- ☐ Retail POS Functions
- ☐ Back-office Reporting
- ☐ E-Commerce/Website Integration
- ☐ Integrated Credit Card Processing
- ☐ Time and Attendance Tracking
- ☐ Labor Scheduling
- ☐ Productivity Monitoring
- ☐ Table Management Module
- ☐ Reservations
- ☐ Inventory Control
- ☐ Recipe Control
- ☐ Customer Loyalty (Frequent Diner)
- ☐ Gift Card Module
- ☐ Multi-store Module/Polling
- ☐ Accounting Module/Integration - [Brand]
- ☐ Payroll Interface
- ☐ Property Management Interface
- ☐ Remote Access
- ☐ Wireless Handheld Order Support
- ☐ Wireless Handheld Credit Card Authorization
- ☐ Wireless Handheld Check Printing
- ☐ Security Camera System Interface
- ☐ Beverage Control System Interface
- ☐ Paging System Interface

✓Detailed Functionality

Here is a list of specific functions to inquire about.

ORDERING

- ☐ Can tables be access by graphical table layout, station or table #?
- ☐ Can orders be easily split after the fact?
- ☐ Can a menu item be split between 2 or more customers?
- ☐ Speed windows for most popular items by day or time?
- ☐ Are menu item/check voids issued by management only?
- ☐ Can special instructions be easily sent to prep stations "on the fly"?
- ☐ "One touch" drink reorder function?
- ☐ Flexible hold & fire by time, time of day or server controlled?
- ☐ Can voids & overrings be tracked & reported by employee?
- ☐ Can menu items be transferred to another guest check?
- ☐ Can checks be easily transferred among servers & bartenders?
- ☐ Product count down/out of stock messaging?
- ☐ Can customer comment/survey forms be printed on receipt?
- ☐ UPC scanning for retail items?
- ☐ Flexible & detailed server reporting?
- ☐ Can server reports be easily customized?

FULFILLMENT/ORDER DISPLAY

- ☐ Flexible order routing to kitchen station/bar?
- ☐ Kitchen chit printing options by station?
- ☐ Menu item routing by kitchen video monitors?
- ☐ Flag orders for expedited preparation?
- ☐ Order recall verification?
- ☐ Print/display drink recipe?

SETTLEMENT

- ☐ Unlimited number and type of discount & comp categories?
- ☐ Are comps issued by managers only?
- ☐ Can guest checks be customized to include "coupons" or other messages?
- ☐ Can "smart coupon" be issued based on items ordered or not ordered?
- ☐ Can coupons be easily customized?
- ☐ Is credit card processing integrated with POS?
- ☐ Can credit cards be pre-authorized for bar tabs?
- ☐ Either server or cashier banking?
- ☐ Can guest checks be combined for single payment?
- ☐ Is there complete reporting for tips in compliance with IRS requirements?
- ☐ Are magnetic strip gift certificate cards supported?
- ☐ Can closed checks be re-opened for adjustments?

MENU MANAGEMENT

- ☐ Can multiple menus be maintained?
- ☐ Unlimited number of menu items & menu modifiers?
- ☐ Menu changes can be made easily?
- ☐ Can discounts be assigned to specific menu items?
- ☐ Can menu items be bundled to create new menu items?

INVENTORY/RECIPE MANAGEMENT

- ☐ Fully integrated?
- ☐ Unlimited inventory items?
- ☐ Analyze actual/ideal usage of key items?
- ☐ Recipe costing?
- ☐ Create and maintain batch and sub recipes?
- ☐ Easy conversion of purchase units to recipe units
- ☐ Calculate ideal food cost based on sales mix, recipe, ingredient costs?
- ☐ Print inventory count sheets by storage room/shelf order?
- ☐ Enter physical inventory item counts?
- ☐ Update ingredient & menu costs automatically when purchases are entered

SALES HISTORY/REPORTING

- ☐ How long can transaction detail be maintained?
- ☐ Can all reports be sent to printer or viewed on screen?
- ☐ Is there a customer report writer?
- ☐ Can certain reports be viewed graphically?

TABLE MANAGEMENT

- ☐ Customizable graphic table floor plan?
- ☐ Supports multiple table floor plans?
- ☐ View status of all tables in graphic display
- ☐ Easily move table and change stations?
- ☐ Create timers & alarms to remind employees of certain conditions?
- ☐ Create priority levels on alarms?
- ☐ Recommend table based upon guest preferences?

CUSTOMER MANAGEMENT

- ☐ Support unlimited number of customers?
- ☐ Create multiple customer reward/frequency programs?
- ☐ Can customer coupons be printed on POS based on points/purchase history?
- ☐ Capture customer purchasing habits in sales volume, frequency of visits, days of week, menu items?
- ☐ Capture customer interests, preferences & special dates?
- ☐ Server access to customer interests & preferences?
- ☐ Generate mailing labels from the customer database based on specific criteria?

TIMEKEEPING/SCHEDULING

- ☐ Can function as timekeeping system?
- ☐ Create schedules based on employee availability?
- ☐ Create labor budgets based on hours & pay rates?
- ☐ Clock in/out control based on employee schedule?
- ☐ Print labor schedules by employee, department, restaurant?
- ☐ Export employee information/hours electronically?

DELIVERY/TAKE-OUT

- ☐ Can functions be added to any station?
- ☐ Can be used for delivery & take-out orders?
- ☐ Maximum size of customer database?
- ☐ Both caller ID or telephone # driven?
- ☐ Can delivery zones be assigned to drivers?
- ☐ Can delivery instructions be printed for each order?
- ☐ View customer preferences & delivery instructions on screen?
- ☐ Customizable prep tickets and guest checks?
- ☐ Targeted mailings based on customer purchase history?
- ☐ Driver settlement per run or shift?
- ☐ Print food contain labels?

OTHER FEATURES/FUNCTIONS

- ☐ Can cash paid outs/ins be recorded by type?
- ☐ Can a receipt be printed for cash paid outs/ins?
- ☐ Integrated house accounts with AR functions?