

POS DEPLOYMENT **DISCOVERY CHECKLIST**

For sales engineering teams scoping POS deployments in retail and restaurant environments.

Work through every section below before you draft the statement of work. A skipped question here is a missed line item on the SOW, and a missed line item is unbilled labor later.

01 CURRENT ENVIRONMENT AND INFRASTRUCTURE	02 SOFTWARE AND INTEGRATION POINTS	03 PHYSICAL SITE AND PERIPHERAL REQUIREMENTS	04 BUSINESS RULES AND OPERATIONAL REQUIREMENTS	05 CLIENT-PROVIDED REQUIREMENTS AND INTERNAL RECONCILIATION
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01 CURRENT ENVIRONMENT AND INFRASTRUCTURE

- ☐ What POS hardware is currently in use (terminals, printers, scanners, cash drawers, card readers)? Note age and condition of each.
- ☐ Which existing hardware, if any, will be reused versus replaced?
- ☐ What is the current internet connection type and speed, and is there a backup connection (cellular failover, secondary ISP)?

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- ☐ What networking equipment is in place today (routers, switches, wireless access points), and is it owned by the client or leased?
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- ☐ Is existing cabling and network drops sufficient for the new terminal locations, or will new runs be required?
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- ☐ Is there a firewall or network segmentation requirement (e.g., PCI-compliant network isolation for payment traffic)?
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- ☐ Does the site have backup power or UPS protection for critical POS and network equipment?
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02 | SOFTWARE AND INTEGRATION POINTS

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- ☐ What accounting or ERP system does the POS need to integrate with?
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- ☐ What inventory management system is in use, and does it require real-time or batch syncing?
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☐ Is there a loyalty or gift card program to integrate, and is it run by a third party?

☐ Are online ordering or delivery platforms involved (and do they need to sync menu or pricing changes automatically)?

☐ Is a kitchen display system (KDS) required, and what workflow does it need to support?

☐ What payment processor and gateway will be used, and are there existing merchant agreements that dictate hardware compatibility?

☐ Does the client need integration with time and attendance, payroll, or workforce management software?

☐ Are there any custom or legacy systems involved that don't have a standard, documented API?

☐ For every hardware model being ordered (especially self-checkout or specialized peripherals), has compatibility with the required operating system and software version been explicitly confirmed, not assumed from the general product line?

- ☐ How many terminal locations are needed, and where is each one physically located [checkout counter, bar, drive-through, kiosk]?

- ☐ Is power and data available at each terminal location, or does electrical or cabling work need to be scoped separately?

- ☐ Does each location need a customer-facing display, signature capture, or PIN pad?

- ☐ Are there self-checkout or kiosk requirements in addition to staffed terminals?

- ☐ What printer requirements exist at each location [receipt, kitchen, label]?

- ☐ Is a drive-through or curbside pickup workflow involved, and what hardware does it require?

- ☐ What is the site's layout constraint [counter space, mounting needs, environmental exposure to heat, dust, or spills]?

- ☐ How many locations are in scope, and is multi-location, consolidated reporting required?

- ☐ What tax rules apply, and do they vary across jurisdictions if multiple locations are involved?

- ☐ What employee roles and permission levels need to be configured?

- ☐ What are the client's expectations for after-hours or emergency support once the system goes live?

- ☐ Is staff training in scope, and if so, how many employees and shifts need to be covered?

- ☐ What is the client's required go-live date, and does it conflict with a peak business period (holiday season, grand opening)?

- ☐ Who is the single point of contact on the client side for scope decisions during the project?

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CLIENT-PROVIDED REQUIREMENTS AND INTERNAL RECONCILIATION

A deployment can stall just as easily on a missing client deliverable, or an unresolved sales-to-implementation gap, as a missing technical detail. Confirm these are complete before the SOW is finalized.

- ☐ Has the client signed and returned all required credit card / merchant account processing forms?

- ☐ Has merchant ID onboarding been completed and confirmed with the payment processor?

- ☐ Has the client provided current photos of each facility or install location, confirming a dust-free, move-in-ready environment?

- ☐ Has the client provided a valid Certificate of Occupancy for each site, or confirmed one isn't required?

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- ☐ Has sales and implementation reconciled the order internally, confirming the scope, timeline, and parts ordered actually match what's deliverable?
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Use this checklist alongside your standard site survey. **Every unchecked box is a question your SOW hasn't answered yet, and every unanswered question is a risk to your margin.**