

# POS Provider Checklist

Submitted to (business name): \_\_\_\_\_

Contact: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

## POS Hardware

**1. Please list all hardware components that will be included in and installed with the system, including:**

a. Manufacturer

\_\_\_\_\_

b. Manufacturers' warranty terms

\_\_\_\_\_

c. Key specifications (including, but not limited to, processor brand, type and clock speed, RAM and HDD capacity, operating system and version, ports and integrated peripherals for POS workstations and file servers)

\_\_\_\_\_

\_\_\_\_\_

d. Quantity and unit price for each component

\_\_\_\_\_

\_\_\_\_\_

**2. What is covered by the hardware warranty?**

\_\_\_\_\_

\_\_\_\_\_

**3. What is the duration of the hardware warranty?**

1 year  2 years  3 years  Other: \_\_\_\_\_

**4. What happens between the end of the warranty and the end of the hardware life span?**

\_\_\_\_\_

\_\_\_\_\_

**5. List the instances where the hardware warranty would be out of scope (i.e. lightning strike, fire, accidental damage, etc.).**

\_\_\_\_\_

\_\_\_\_\_

## POS Software

**6. Please list all software modules that will be included in and installed with the system, including:**

a. Quantity and unit price for each module

\_\_\_\_\_

\_\_\_\_\_

b. Additional modules available

\_\_\_\_\_

\_\_\_\_\_

c. Additional costs I will incur for installation, training, programming and maintenance of the optional modules each year:

Card processing .....  Yes ...  No ..... Cost?: \_\_\_\_\_

Time and attendance ....  Yes ...  No ..... Cost?: \_\_\_\_\_

Host and reservation ....  Yes ...  No ..... Cost?: \_\_\_\_\_

Delivery .....  Yes ...  No ..... Cost?: \_\_\_\_\_

Online ordering .....  Yes ...  No ..... Cost?: \_\_\_\_\_

Gift Card .....  Yes ...  No ..... Cost?: \_\_\_\_\_

**7. What are the hours for live phone software support?**

\_\_\_\_\_

**8. Are customer service calls for software answered by your company specifically, or is customer service outsourced?**

Your company specifically  Outsourced

**9. Please list the charges and fees for software support.**

\_\_\_\_\_

\_\_\_\_\_

**10. Are minor releases (service packs) included in the software support fees?**

Yes  No

If no, what are the additional charges?

\_\_\_\_\_

11. Are **major** releases (service packs) included in the software support fees?

- Yes  No

If no, what are the additional charges?

\_\_\_\_\_

12. How will you help ensure my system is PCI compliant?

\_\_\_\_\_

\_\_\_\_\_

### Schedule of Fees

13. Are the fees for the following products and services included in your base pricing? If not, please specify the fee amount and schedule (one-time, hourly, daily, weekly, monthly, quarterly, annually or other):

Included Not Included

System installation .....  .....

Amount: \_\_\_\_\_ Schedule: \_\_\_\_\_

Management training .....  .....

Amount: \_\_\_\_\_ Schedule: \_\_\_\_\_

Staff training .....  .....

Amount: \_\_\_\_\_ Schedule: \_\_\_\_\_

Database programming .....  .....

Amount: \_\_\_\_\_ Schedule: \_\_\_\_\_

Database updates .....  .....

Amount: \_\_\_\_\_ Schedule: \_\_\_\_\_

Network wiring .....  .....

Amount: \_\_\_\_\_ Schedule: \_\_\_\_\_

Consumables (paper, ribbons, cash drawer inserts, manager/staff magnetic cards, etc.) .....  .....

Amount: \_\_\_\_\_ Schedule: \_\_\_\_\_

Annual software support .....  .....

Amount: \_\_\_\_\_ Schedule: \_\_\_\_\_

Annual hardware support .....  .....

Amount: \_\_\_\_\_ Schedule: \_\_\_\_\_

### Support

14. What service level for hardware support is included in your base pricing?

- On-site, Mon.-Fri., 9-5  Depot, next business day
 On-site, 24/7/365  Depot, 24/7/365
 Other \_\_\_\_\_

15. Does your company provide a Service Level Agreement?

- Yes  No

### Card Processing

16. Does your POS software over-authorize bankcard transactions to cover tips?

- Yes  No

17. Will I be required to use a specific card processing company?

- Yes  No

If so, please identify the processor.

\_\_\_\_\_

18. Does your company receive revenue from payment processing fees?

- Yes  No

If so, how much?: \_\_\_\_\_

### Gift Cards

19. Are gift cards processed internally in the POS system or externally?

- Internally  Externally

20. Is there a charge for the gift cards themselves? Monthly charges? Transaction charges?

\_\_\_\_\_

\_\_\_\_\_

### Payroll

21. Does the POS have an online payroll module that enables me to submit my payroll directly from the system?

- Yes  No

22. Can the software control clock-ins to prevent employees from clocking in outside of their scheduled times?

- Yes  No

### Terms of Agreement

23. What are the terms of the service agreement, and what are the penalties associated with terminating my agreement before the end of the term?

\_\_\_\_\_

\_\_\_\_\_

24. What is my liability in the event of a breach in which my customers' payment card account information is compromised?

\_\_\_\_\_

\_\_\_\_\_

25. Please attach your proposal as well as the complete terms and conditions.

Your signature below confirms you have disclosed all information and fees and guarantee the accuracy of the information you have provided here, and the competitive proposal you have submitted on behalf of your organization.

Printed name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_