NEOVARA

POS & RETAIL TECHNOLOGY ADVISORY

POS Unification Checklist

A practical, field-tested checklist for planning and executing a point-of-sale unification project across multiple outlets, brands, or regions.

CLIENT		PROJECT	
DATE		OWNER	

1 Scope

- [ ] Define the business reason for unifying POS: reporting consistency, lower support costs, better controls, faster rollout, or a single guest experience.
- [ ] Confirm whether the goal is full standardization on one POS or a unified layer across multiple POS systems.
- [ ] Set clear success metrics, such as faster close, fewer manual reconciliations, cleaner store-level reporting, and fewer integration breaks.

2 Current State

- [ ] List every outlet, brand, and country using POS today.
- [ ] Record the current POS version, hardware setup, integrations, and contract end dates for each site.
- [ ] Identify which functions are handled in POS versus other systems, such as inventory, accounting, loyalty, delivery, or kitchen display.

3 Data

- [ ] Audit menu structure, item naming, tax rules, discounts, modifiers, and payment methods across all sites.
- [ ] Standardize master data fields before migration, including item IDs, outlet IDs, channel names, and revenue categories.
- [ ] Check data quality issues like duplicate items, inconsistent categories, missing tags, and mismatched codes.

4 Integrations

- [ ] Map every system connected to POS: PMS, accounting, payroll, delivery aggregators, CRM, loyalty, inventory, and reporting tools.
- [ ] Verify API access, webhook support, file exports, and sync frequency for each integration.
- [ ] Decide what must remain real time, what can be batch-synced, and what can be retired.

5 Operations

- [ ] Document store workflows for opening, closing, refunds, voids, comps, transfers, and approvals.
- [ ] Confirm role permissions for cashiers, supervisors, managers, finance, and head office users.
- [ ] Test whether the new setup supports outlet-specific needs without breaking the standard model.

6 Migration

- [ ] Build a site-by-site rollout sequence, starting with a pilot outlet or low-risk cluster.
- [ ] Define a parallel-run period where old and new systems are compared before cutover.
- [ ] Prepare a rollback plan in case payments, menu sync, or reporting fails during go-live.

7 Testing

- [ ] Run test cases for sales, refunds, discounts, taxes, split bills, online orders, end-of-day close, and exports.
- [ ] Validate reports against finance records and bank settlements.
- [ ] Test peak-hour performance, offline mode, printer stability, and kitchen routing.

8 Training

- [ ] Identify a local champion at each outlet and one central owner for the program.
- [ ] Train staff on the new workflows, not just the software screens.
- [ ] Prepare quick reference guides for cashiers, managers, and support teams.

9 Controls

- [ ] Set approval rules for discounts, voids, comps, and manual price overrides.
- [ ] Define data governance ownership for menus, taxes, item hierarchy, and outlet mapping.
- [ ] Establish audit logs and exception reporting so head office can monitor changes.

10 Go-Live

- [ ] Monitor the first 2–4 weeks closely for sales reconciliation issues, failed syncs, and user errors.
- [ ] Compare daily sales, payment totals, and tax outputs against the legacy system.
- [ ] Track adoption, recurring issues, and support tickets, then fix root causes before expanding to the next site.

11 Sign-Off

- [ ] Business approves standardized menu and reporting structure.
- [ ] Finance approves reconciliation logic and tax treatment.
- [ ] Operations approves workflow fit for each outlet type.
- [ ] IT or vendors approve integration, security, and backup readiness.
- [ ] Leadership signs off on the rollout plan and timeline.

Approval

Business _____

Finance _____

Operations _____

IT / Vendor _____

Leadership _____